



A DOCLINE OVERVIEW

Release 1.4



New England Region (NER)



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Introduction and History

DOCLINE is the National Library of Medicine's automated interlibrary loan (ILL) request routing and referral system. The purpose of the system is to provide improved document delivery service among libraries in the National Network of Libraries of Medicine (NN/LM).

DOCLINE was started in March of 1985. The system has gone through several incarnations, the most significant in 2000 when it changed from Telnet to a web-based system. We anticipate the continued evolution of DOCLINE, as both technology and the needs of its users change. As of September, 2002, the current release of the production system is Release 1.4.

The DOCLINE system serves over 3,000 U.S. and Canadian medical libraries at no cost.

The Library Identifier (LIBID)

LIBID (acronym for **Lib**rary **ID**entifier)

Correct pronunciation: "**l-eye-b eye-dee**" (as in "ID"), NOT "*lib-id*" (rhyming with "*livid*")

LIBID's are composed of six alpha characters and can be broken down, as follows:

Position #1, 2	State code (CT, MA, ME, NH, RI, VT)
Position #3	Country code (U=USA)
Position #4, 5, 6	former SERHOLD codes

If you see a LIBID in lower case [within brackets] at the upper right corner of your screen, it means that your library has either temporarily deactivated DOCLINE routing due to a HOLD request (*see* below) or you are a member of the NN/LM network as a non-DOCLINE participant. (i.e., DOCLINE doubles as a membership database.)

HOLD Requests

In small libraries, often there is only one person performing the ILL (InterLibrary Loan) function; when this person is expected to be away from the library for an extended period of time, they may want to "place a hold" on requests that are sent or routed to them.

To generate a "HOLD Request":

- Step 1.* Enter the URL: <http://nnlm.gov/libinfo/DOCLINE/dochold.html>
- Step 2.* Enter your LIBID, Institution, Name and Phone Number, and indicate the dates for deactivation and reactivation on the online form provided.
- Step 3.* Click the **SUBMIT** button to send your HOLD Request to your DOCLINE Coordinator. Confirmation e-mails will be sent out:
 - (a.) acknowledging your request;
 - (b.) when your routing is suspended;
 - and (c.) when it is resumed.

HOLD Requests



To place future HOLD Requests, add a **Favorite** (*Internet Explorer*) –or-- a **Bookmark** (*Netscape*) to the URL link above.

Logging On to DOCLINE

Logging on to the DOCLINE system is *E-Z*:

To initiate a DOCLINE session:

- Step 1.* Enter the URL: <http://wwwcf.nlm.nih.gov/DOCLINE/index.cfm>.
- Step 2.* Enter the UserID and Password for your account. If you forget your UserID or Password and no one else at your institution remembers, contact your Network Coordinator at the NER Regional Office.



DOCLINE 1.4 Login
Please enter your DOCLINE User ID and Password.
User ID:
Password:

[DOCLINE System](#) Information and Customer Service
[U.S. National Library of Medicine](#), 8600 Rockville Pike, Bethesda, MD 20894
[National Institutes of Health](#)
[Department of Health & Human Services](#)
[Copyright and Privacy Policy](#), [Freedom of Information Act](#)



For future DOCLINE sessions, add a **Favorite** (*Internet Explorer*) –or-- a **Bookmark** (*Netscape*) to the URL link above.

Contact DOCLINE

When you want to report potential problems with the system, please use the "Contact DOCLINE" feature, which may be found under the DOCLINE Help menu. Please note with Release 1.4, help screens were added or modified for the new features.

If you are unsure about the nature or cause of the problem, and require additional diagnosis and support, please contact Mark Goldstein, the Regional Network Coordinator for the New England Region (NER Region 8), by phone (508-856-5964) –or-- by e-mail (mark.goldstein@umassmed.edu.)

DOCLINE Release Notes 1.4

REQUESTS MODULE

1. **Reports:** *Report 1-7. Routing Table Statistics.* Modified report filters out closed libraries.
2. **Status/Cancel:** Added time in hours and minutes to the History of Request page. Time is displayed in 24-hour format, Eastern Time (ET).
3. **Delivery Address:** Added validation to ensure data is contained in 'Ship to Name', 'Street', 'City', and 'State' fields to prevent blank shipping address.

DOCUSER MODULE

4. **Address:** Added URL fields for 'Library Home Page' and 'Institution Home Page'; added phone number field for institution.
5. **Codes:** Changed field label 'National Union Catalog ID' to 'MARC Organization Code' to maintain consistency with MARC 21 field labels.
6. **Contacts:** Added contact types for 'Consumer Health', 'Link Out', and 'Other'. Use 'Other' to add staff not associated with any of the other contact types.
7. **Search:** Added ability to search by the number of holdings.
8. **Display:** (a.) Changed "ILL Information" search result display to include number of holdings and library group membership; (b.) Changed "Contact Names" search results display to list all contact types (*not* just the ILL contact name); (c.) Added a link to the full DOCUSER record from the displayed LIBID in all of the DOCUSER search result displays; and (d.) Removed 'Old LIBID' as a search and sort order option.
9. **Interlibrary loan:** Modified 'Participates in Electronic Payment' field label to "Participates in EFTS"; and Added 'Date Joined EFTS' field to ILL Services page display.
10. **Services:** Added field for listing in 'MEDLINEplus Consumer Health Libraries' page (<http://www.nlm.nih.gov/medlineplus/libraries.html>); and removed outdated fields.

DOCLINE Release Notes 1.4

SERHOLD MODULE

11. **Display:** Removed "Frequency Code" and added "Current Publication Frequency" field (310 in the MARC bibliographic record) on all SERHOLD screens.

RML ADMINISTRATION

12. Added date of last routing table update and date of last SERHOLD update to DOCUSER ftp file.

LD ADMINISTRATION

13. **LD Patron Admin:** Added delivery method, comments, and transfer authorization information to LD patron display for the Ordering Library.
14. **Messages:** Added notification to Home Page message area when a new LD patron registers.

HELP

15. **Help screens:** Added or modified for new features /changes to DOCLINE 1.4.
16. **Contact DOCLINE** and **Contact RML:** (a.) Added ability for sender to copy message to their email address on all 'Assistance and Comments' forms; (b.) Separated Name field into 'Last Name' and 'First Name' on all 'Assistance and Comments' forms; and (c.) Removed field 'DOCLINE User ID' from all 'Assistance and Comments' forms.

LOANSOME DOC PROGRAM

17. **Change Ordering Library:** Added 'contact Library for service' message to LD instructions.
18. **Order Documents:** (a.) Enhanced message indicating user is no longer authorized for ordering library; and (b.) Added author field to 'Loansome Doc order sent' page.
19. **Status of Orders:** Added 'Reason' request 'Not Filled' to the LD patron's Status page [for example, Cost.]



MODULE II. DOCUSER

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II. DOCUSER Update

DOCUSER contains directory, interlibrary loan and network information about libraries that participate in NLM's ILL Service and the NN/LM's (National Network of Libraries of Medicine's) network.

DOCUSER is one of the most important components of DOCLINE. It contains the Routing Table and other information that determines which libraries will receive DOCLINE requests.



KEY NOTE

It is important to keep your DOCUSER record up-to-date, so the DOCLINE system works optimally for you. It is also important to keep your record current so that other libraries can find correct information about your library.

To initiate a DOCUSER Update session:

Step 1. Log into DOCLINE (*see Module I for instructions*).

Step 2. Click **DOCUSER**.

Step 3. Click **Update**.

The screenshot shows the DOCLINE web interface in a Netscape browser window. The address bar shows the URL: <http://www.nlm.nih.gov/docline/login.cfm>. The page header includes the DOCLINE logo and navigation links: REQUESTS, DOCUSER, SERHOLD, LD, HELP, HOME. A red link for Logoff-MAUBPM is also visible. The main content area is titled "National Network of Libraries of Medicine" and "New England Region (LIBID: MAUBPM)". Below this, there is a "Select Address Type:" dropdown menu with "Document Delivery" selected. The "Update" section contains a form with the following fields: Institution (National Network of Libraries of Medicine), Department (New England Region), Street (222 Maple Ave.), City (Shrewsbury), County (Worcester), State/Province (U.S. or Canada) (Massachusetts), State/Province (Other) (empty), Zip/Mail Code (01545-2732), Country (USA), and Congressional District (U.S. only) (03). At the bottom of the form are "Save" and "Reset" buttons. A footer note indicates "Last updated on: AUG 28, 2001".

II. DOCUSER Update

Your DOCUSER record is organized into five (5) segments, each with its own tab. From the **Address** tab, there are two (2) *Address Type* screens that are accessible from a drop down box. The default display is on the *Document Delivery* screen. Select a screen by highlighting the item within the drop down box.

The screenshot shows the DOCLINE web interface in a Netscape browser window. The address bar shows the URL <http://www.nlm.nih.gov/docline/login.cfm>. The page header includes the DOCLINE logo and navigation links: REQUESTS, DOCUSER, SERHOLD, LD, HELP, HOME. The 'Address' tab is selected, and the 'Document Delivery' address type is chosen from the dropdown menu. The form fields are populated with the following information:

Institution	National Network of Libraries of Medicine
Department	New England Region
Street	222 Maple Ave.
City	Shrewsbury
County	Worcester
State/Province (U.S. or Canada)	Massachusetts
State/Province (Other)	
Zip/Mail Code	01545-2732
Country	USA
Congressional District (U.S. only)	03

Buttons for 'Save' and 'Reset' are at the bottom. The status bar indicates 'Document Done'.

Please update both addresses to ensure correct mailings. Your **Document Delivery** address will be used by lending libraries to fill borrow requests. Your **Institution** address will be used by the NER Regional office to send out NLM Certificates of Membership (every five years.) With Release 1.4, fields have been added to provide URL's for the institution's home Web page and the library's home Web page, in addition to a phone number for the library.

The screenshot shows the DOCLINE web interface in a Microsoft Internet Explorer browser window. The address bar shows the URL <http://www.nlm.nih.gov/docline/login.cfm>. The page header includes the DOCLINE logo and navigation links: REQUESTS, DOCUSER, SERHOLD, LD, HELP, HOME. The 'Address' tab is selected, and the 'Institution' address type is chosen from the dropdown menu. The form fields are populated with the following information:

Institution	National Network of Libraries of Medicine
Department	New England Region
Street	222 Maple Ave.
City	Shrewsbury
County	Worcester
State/Province (U.S. or Canada)	Massachusetts
State/Province (Other)	
Zip/Mail Code	01545-2732
Country	USA
Congressional District (U.S. only)	03
Institution Home Page (URL)	http://www.umassmed.edu/
Library Home Page (URL)	http://www.umassmed.edu/library/
Public Catalog Home Page (URL)	http://quin.umassmed.edu/
Library Phone	1 Area/City Code 800 Local Number 338-7657 Ext.

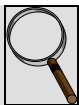
Buttons for 'Save' and 'Reset' are at the bottom. The status bar indicates 'Internet'.

II. DOCUSER Update

The **Codes** tab (*see below*) provides membership information. It is for the most part "display only" (you cannot edit its contents.) Click the arrow of the *Library Groups* drop down box to review the library groups in which your library participates. To be added to a particular group, contact your Regional Network Coordinator at the NER Regional Office.

The bottom portion of the screen, however, may be updated. Indicate your OCLC symbols, MARC Organization Code, or additional comments about your library, such as other ILL systems that you use.

II. DOCUSER Update



A CLOSER LOOK

- *OCLC Symbol 1* (your library is assigned an OCLC symbol for referral in the OCLC system.)
- *OCLC Symbols 2 and 3* are for different library branches within your institution.
- The *MARC Organization Code* has replaced the former obsolescent "National Union Catalog ID" field, to maintain consistency with MARC21 field labels.
- *Batch Update Authorization* is an NLM "work in progress"; batch updates of serial holdings to and from OCLC are in their final testing phases and are expected to be realized in the very near future.
- Remember to click the **Save** button after updating each screen or your work will be lost.

II. DOCUSER Update

There are nine (9) *Contact Category* screens accessible from a drop down box within the **Contacts** tab: *Consumer Health, Director, Interlibrary Loan, LinkOut, Loansome Doc, Network, Reference, SERHOLD* and *Other* screens. A screen refresh defaults on a display of the *Interlibrary Loan* screen. Select a screen simply by highlighting an item from the drop-down box.

DOCLINE® interlibrary loan request routing and referral system

Address Codes **Contacts** Interlibrary loan Services

National Network of Libraries of Medicine
New England Region (LIBID: MAUBPM)

Select Contact Category:
Interlibrary Loan

Update

Mark Goldstein
Network Coordinator

Country Code 1 Area/City Code 508 Local Number 856-5964 Ext.
Country Code Area/City Code Local Number Ext.

mark.goldstein@umassmed.edu
URL for Home Page

Save Reset

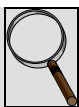
Last updated on: MAR 27, 2002



KEY NOTE

Click on the **Save** button after completing each screen or your work will be lost!

II. DOCUSER Update



A CLOSER LOOK

- NLM strongly recommends entering information in **Initial Caps** and **lower case**; this not only reduces data storage requirements at NLM, but it also provides uniformity and a consistency to the format.
- It is very important to complete fields for all of the screens. These are contacts for *your* services! Even if you are a one-person library, the rule of thumb is enter the same contact information for all of the screens listed.
- One exception to the rule: if you are NOT a Loansome Doc participant (an "Ordering Library"), do NOT complete the *Loansome Doc* screen.
- Be consistent! If the Contact Name is "Mark Goldstein M.L.I.S." on the *Interlibrary Loan* screen, list it the same on the *Network* screen -- that is, NOT "Mark Goldstein" or "M. Goldstein"! This will pay off later when you are conducting searches on Contact Names -- your name will come up "*once and only once*," rather than multiple times.
- Please keep in mind that there are multiple screens under each tab.
- Under the *Address* tab, Congressional district and County fields should be filled in; this is part of NLM's mapping strategy and will assist NLM in their quest for Congressional funding.
- Remember to click the **Save** button after completing each screen or your work will be lost!

II. DOCUSER Update

There are eight (8) *ILL Information Category* screens accessible from a drop down box within the **Interlibrary Loan (ILL)** tab: *Charges*, *Delivery Methods*, *DOCLINE*, *ILL Services*, *Loansome Doc*, *Routing Profile*, *Routing table* and *SERHOLD* screens. A screen refresh defaults on a display of the *Charges* screen. Select a screen simply by highlighting an item from the drop down box.

DOCLINE® interlibrary loan request routing and referral system

NATIONAL LIBRARY OF MEDICINE

REQUESTS DOCUSER® SERHOLD® LD HELP HOME

Update Search/View

Address Admin Codes Contacts **Interlibrary loan** Services

National Network of Libraries of Medicine
New England Region (LIBID: MAUBPM)

Select ILL Information Category:

Charges

Charges

Delivery Methods

DOCLINE

ILL Services

Loansome Doc

Routing Profile

Routing Table

SERHOLD

Update

Charges	Loan Period	Renewal	Comments
11.00			Free to NER (Region 8) libraries
21.00			
			Do not circulate
			Do not circulate
			Do not circulate

Other comments: NER Demonstration Record

Save Reset Search Results

Last updated on: NOV 29, 2001.



KEY NOTE

Remember to constantly click the **Save** button after completing each screen or your work will be lost!

II. DOCUSER Update

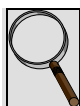
Indicate your library's charges, using the *Comments* field for explanations or special notes.

Service Type	Charges	Loan Period	Renewal	Comments
Audiovisual				
Copy	11.00			Free to NER (Region 8) libraries
Fax	21.00			
Bound Journal				Do not circulate
Unbound Journal				Do not circulate
Original				Do not circulate
Referrals				

Other comments: NER Demonstration Record

Buttons: Save, Reset, Search Results

Last updated on: NOV 29, 2001



A CLOSER LOOK

- Charges are very important; it's the first thing that comes up with placing an ILL request.
- Keep all Comments fields "nice-and-clean" and "easy-to-read" (for example: "*free to all consortium members*"; "*Do Not Calculate*", etc.)
- Remember to click the **Save** button after completing each screen or your work will be lost!

II. DOCUSER Update

Indicate your delivery methods for receiving or sending documents. US Mail is your default delivery method. Use this screen to indicate Fax, Ariel, E-mail and web file formats for additional receipt and delivery options.

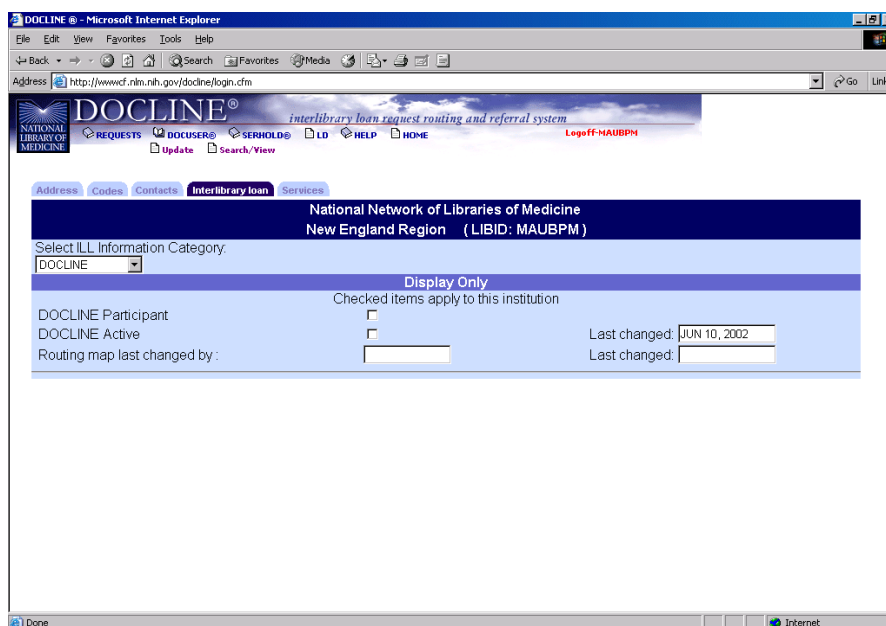


A CLOSER LOOK

- Please take the time to review and update this screen. If you've installed an electronic document delivery system (such as Ariel), please make sure to enter the static/fixed IP address here.
- Unless otherwise indicated, the U.S. Mail will be the default delivery method for both sending and receiving documents.
- Remember to click the **Save** button after completing each screen or your work will be lost!

II. DOCUSER Update

The *DOCLINE* screen under the **Interlibrary Loan** tab is for "display only" -- there is no updating this screen.



A CLOSER LOOK

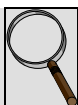
- DOCLINE doubles as NLM's membership database, in addition to functioning as an ILL routing system.
- All DOCLINE participants are Members of NLM and NN/LM, but not all Network Members are DOCLINE participants. Some corporate or special libraries may choose to limit their lending services to in-house patrons. These libraries would, in essence, become "affiliate members" of the NN/LM network, and would not be participants in the DOCLINE interlibrary loan system.
- The current membership policy for NN/LM's New England Regional (NER) office regards all NON-DOCLINE participating members as "Affiliate" members.

II. DOCUSER Update

On the *ILL Services* screen under the **Interlibrary Loan** tab, check off boxes for "Borrows" and "Lends". Check off any remaining boxes, if you participate in any of these functions. Enter the URL for your ILL Home Page and Comments, as needed.

Please note that with Release 1.4, EFTS participation, along with date joined is indicated on this screen.

The screenshot shows the DOCLINE web application interface. At the top, there's a navigation bar with links like REQUESTS, DOCUSER, SERHOLDS, LD, HELP, and HOME. The main content area is titled 'University of Massachusetts Medical Center The Lamar Soutter Library (LIBID: MAUMAS)'. It features a 'Select ILL Information Category' dropdown menu set to 'ILL Services'. Below this, there's a 'Display Only' section with a link to 'Contact your RML to modify the Display Only information'. The 'Participates in EFTS' section shows 'Yes' and 'Date joined EFTS' as 'Jan-24-1996'. An 'Update' section prompts the user to 'Check all that apply to this institution'. There are checkboxes for 'Borrows items via Interlibrary Loan' and 'Lends items via Interlibrary Loan', both of which are checked. Below these are input fields for 'ILL Home Page (URL)' and 'ILL comment'. At the bottom, there are 'Save' and 'Reset' buttons. The status bar at the very bottom indicates 'Last updated on: JUL 17, 2000'.



A CLOSER LOOK

- The Electronic Fund Transfer program is a national system that is administered by the University of Connecticut Libraries, headquartered in Farmington (See Module VI for contact information.)
- The checkbox next to "Uses ISO/ILL Protocol" should be left unchecked at this time. Standards compliance remains on the NLM agenda.
- Remember to click the **Save** button after completing each screen or your work will be lost!

II. DOCUSER Update

You need only complete the *Loansome Doc* screen under the **Interlibrary Loan** tab if you are a Loansome Doc "Ordering Library" (see Module V).

DOCLINE® interlibrary loan request routing and referral system

REQUESTS DOCUSER® SERHOLD® LD HELP HOME Logoff: MAUBPM

Address Admin Codes Contacts **Interlibrary loan** Services

National Network of Libraries of Medicine
New England Region (LIBID: MAUBPM)

Select ILL Information Category:
Loansome Doc

Update
Check all that apply to this institution

Loansome Doc Participant ☒

Provides services to:

Affiliated Health Professionals ☒
Unaffiliated Health Professionals ☐
International Libraries ☐
Non (US) Citizens ☐
Non Health Professionals ☐

Charges for services to:

Affiliated Health Professionals ☐
Unaffiliated Health Professionals ☐
International Libraries ☐
Non (US) Citizens ☐
Non Health Professionals ☐

URL for Loansome Doc Home Page

Comments

Save Reset Search Results

Last updated on: NOV 29, 2001.

II. DOCUSER Update

The next screen item off the **Interlibrary Loan** tab is the *Routing Profile* screen. This screen contains default information that is placed automatically into your requests. A completed Routing Profile saves you from having to re-enter this information every time you initiate a request.

The screenshot shows the DOCLINE DOCUSER Update screen for the Routing Profile. The browser window is titled "DOCLINE - Netscape" and the address bar shows "http://wwwcd.nlm.nih.gov/docline/login.cfm". The page header includes the DOCLINE logo and navigation links: REQUESTS, DOCUSER, SERHOLD, LD, HELP, HOME. The user is logged off as MAUBPM. The main content area is titled "National Network of Libraries of Medicine New England Region (LIBID: MAUBPM)". It features a "Select ILL Information Category:" dropdown menu with "Routing Profile" selected. Below this is an "Update" section with various fields: "Form" (Copy), "Copyright Compliance" (Guidelines), "Maximum Cost \$" (11.00), "Comments" (DO *NOT* FILL -- FOR DOCLINE TRAINING ONLY!!), "Authorized By" (Mark), "Network Delivery" (Mail), "NLM Delivery" (ARIEL), "Ariel IP" (123.456.6789), "M/A/N Map" (NYUGNR, MDUSRL, UTUBPF, CAUPSR), and "Route Cells" (1, 2, 3, 4, 5, 6, 7, 8, 9). There are checkboxes for "Refer to Resource Libraries" and "Refer on after NLM". At the bottom are "Save", "Reset", and "Search Results" buttons. The footer indicates "Last updated on: NOV 29, 2001".

If your institution utilizes OCLC for all monograph borrowing, it is NOT necessary for you to fill in a M/A/N map.

In general, the first cell in your *M/A/N Map* should contain your primary lender of monographs, audiovisuals, and non-serial titles (usually a large Resource Library with an extensive monograph collection.) The other three cells should contain frequently used lending libraries, in priority order. Your default *M/A/N map* in your Routing Profile does not have to contain the maximum number of institutions, but it should contain at least one.

Enter LIBID's for those libraries whose collections can best fill these requests for you.

The Manual Search feature (see Module III-D) will route to these libraries and to NLM, which is the *invisible fifth* library in everyone's *M/A/N map*.

If you leave these boxes blank, non-serial and manual requests will route directly to NLM. Each *Route Cell* must be checked off for the automatic routing table to work properly.

II. DOCUSER Update



A CLOSER LOOK

- When setting up defaults for routing instructions, keep in mind that a vast majority of requests are made for borrowing, and NOT for lending.
- Each item on this screen should be considered carefully before completion:

Form	Default value is "Copy"
Copyright	Default value is "Guidelines"
Maximum Cost	Common value \$: "11.00" Enter the maximum cost you'd be willing to spend 99% of the time for a borrow request. If the answer is "nothing at all", then Enter: FREE . If the answer is: "you'd be willing to pay anything ", Enter: N/A
Comments	Will appear on all requests that are made (For example: "Prefer delivery by Ariel.") Comments may be made on a case-by-case basis, but the default for Comments gets stored here!
Authorized By	Must be completed before any loans can be processed. Enter the name or initials of the default person to be authorized.
Network Delivery	Common value is "MAIL" -- you don't want to limit your options for getting your borrow requests filled; you want to make sure that your request gets routed to everyone that is stored in your routing table (presumably, not everyone can send documents electronically!)
NLM Delivery	Select the delivery method of your choice for receiving filled requests.
Ariel IP	Enter the static/fixed IP address for receiving documents via Ariel.
M/A/N Map	M/A/N Map: Manual/Audiovisual/Nonserial titles; this is used as a backup when OCLC is not an option. To add or change M/A/N Map entries, click the Edit button next to the cell. You will be prompted every inch of the way.
Route Cells	All cells must be checked for automatic routing to work.
Refer to Resource Libraries	Leave unchecked if you do NOT want to have requests forwarded on to a random 20 out of > 140 Resource libraries located in the U.S.
Refer on after NLM	Leave unchecked if you never intend to have a request routed to NLM (you never want to incur a charge for any request.)

II. DOCUSER Update

The next screen off the **Interlibrary Loan** tab is the *Routing Table* screen. This screen provides DOCLINE with the instructions as to where to send your borrow requests.

You have nine (9) cells in your routing table. There are slots for twenty (20) libraries in each cell. Begin making routing table changes by selecting a cell. Click the **Add** button and a window will appear for searching for the library's LIBID. When the library appears, click the LIBID and it will automatically be added to next available slot within the cell you have displayed (*see below.*)

II. DOCUSER Update

For cells 1 through 3: Use these for consortia members and local libraries for which you have a reciprocal borrowing/lending agreements. Cell 1 should be reserved for libraries with fewer than 100 titles in SERHOLD, and cells 2 and 3 for libraries with between 100-200 titles in SERHOLD. Place heavily utilized libraries of a consortium in cells 2 and 3, allowing DOCLINE to search the smaller institutions first. If you are a member of BHSL, the suggested cell placement for Level 2 BHSL is cell 2; for Level 3 BHSL, cell 3; and so forth. Cell 1 is for your local consortium and Level 1 BHSL libraries (i.e., libraries that have not submitted statistics for the previous year.)

For cells 4 through 6: Use these for non-consortium members with which you have a reciprocal agreements or libraries with more than 300 titles in SERHOLD. . If you are a member of BHSL, the suggested cell placement for Level 4 BHSL is cell 4; for Level 5 BHSL, cell 5; and so forth.

For cells 7 and 8: Use these for specialized libraries and Resource Libraries, placing those in geographic proximity to your institution in cell 7. For BHSL, Level 7 libraries should be placed in cell 7, before the placement of Resource Librraries. Unless they are in your local consortium Level 8, BHSL libraries should be prefixed only and should be used for unique materials.

For cell 9: Use this cell for very large Resource Libraries.

II. DOCUSER Update

To remove a library from a slot within the cell, click the **Remove** button and a window will appear prompting you for the row number of the slot you wish to remove (see below).

To move a library from one slot to another within the cell, click the **Move** button and a window will appear prompting you for the row number of the slot you wish to move (see below.)

When you have finished making all of the changes, click the **Save all cells** button highlighted with a **red** bar at the right center portion of your screen (see below.)

II. DOCUSER Update



KEY NOTE

Your Routing Table is treated as private information. It is NOT publicly displayed and may be accessed only through your own account.

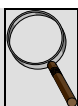


A CLOSER LOOK

- Routing table changes are submitted to your Network Coordinator at the NER Regional Office. Generally, changes are readily approved. Occasionally, a "red flag" is spotted (e.g. "CISTI" a Canadian group in Cell #1.) The Network Coordinator for the region will give you a call just to make sure that the change was intentional.
- The red bar displayed on either side of the **Save all cells** button does not blink. (This is what is regarded as the "*non-intuitive*" piece of the system.)
- Click your browser menu function "File", then "Print" to print out your current Routing Table. Make all of your corrections first and make sure that your printer is powered ON.
- And you are NOT permitted to enter your own LIBID -- it will be rejected by the system!
- Don't mix apples with oranges -- "free of charge" and "charge" libraries should never be stored within the same routing cells.
- You have a total maximum of 180 slots spread out over 9 cells, but there is no need to fill them all.
- There's a random algorithm at work behind the scenes. Where libraries fall within a particular cell matters not one whit. An automatic search proceeds hierarchically **ACROSS** cells, **NOT WITHIN** them.
- Remove problem libraries: whether it is due to understaffing or other difficulties. Sometimes libraries cannot offer the rapid service needed and expected by others. If you find that your requests frequently sit unacknowledged at a specific library before routing onward, you may want to remove them from your Routing Table. You can always add them back at a later date.
- Reduce your reliance on prefixing: let DOCLINE do the work of identifying which libraries own the correct journal title and volume. If you are frequently prefixing requests, you may want to make changes to your Routing Table. If you prefix to control ILL costs, consider grouping low and no-cost lenders together and then use Start-Stop routing, rather than prefixing by checking off the boxes on your *Routing Instructions* screen.
- Your Routing Table is the key to the efficient use of the DOCLINE system.

II. DOCUSER Update

The final screen off the **Interlibrary Loan** tab is the *SERHOLD* screen. This screen allows you to view the size of your library's holdings.



A CLOSER LOOK

- Keep your SERHOLD file updated by checking at least twice a year.
- If you review your SERHOLD file without making changes, enter the review date at the bottom of the screen and hit the **Save** button.
- Levels indicate the number of journal titles listed in your holdings:
 - 0** optimum; excellent information
 - 1** good information
 - 2** not enough information; usually only titles provided; need more
 - 3** maximum amount; good quantity, not quality of information; usually title, year, volume

II. DOCUSER Update

Under the **Services** tab there are three (3) screens: *Consumer Health*, *Network Membership*, and *Service Profile*.

Note that with Release 1.4, a field was added for authorizing listing in the "MEDLINEplus Consumer Health Libraries" page (<http://www.nlm.nih.gov/medlineplus/libraries.html>).

The *Consumer Health* screen indicates if your library has a consumer health collection, as well as information about your consumer health Home Page.

II. DOCUSER Update

The *Network Membership* screen is a "display only" screen, indicating information about your network membership.

The screenshot shows a Netscape browser window displaying the DOCLINE website. The address bar shows the URL <http://www.nlm.nih.gov/docline/login.cfm>. The page header includes the DOCLINE logo and navigation links: REQUESTS, DOCUSER, SERHOLD, LD, HELP, and HOME. A red link for Logoff-MAUBPM is also visible. The main content area is titled "National Network of Libraries of Medicine New England Region (LIBID: MAUBPM)". Under the "Services" tab, the "Network Membership" option is selected. The page is labeled "Display Only" and states "Checked items apply to this institution". The form contains the following fields:

Library Closed	<input type="checkbox"/>
Closed Date	<input type="text"/>
Merged With	<input type="text"/>
NN/LM Full Member	<input checked="" type="checkbox"/>
NN/LM Affiliate Member	<input type="checkbox"/>
Date Joined	<input type="text"/>
Renewal Date	<input type="text"/>

II. DOCUSER Update

The *Services* screen indicates what services your library will provide and what charges, if any, will be assessed.

DOCLINE® interlibrary loan request routing and referral system

Service Profile

Update
Check all that apply to this institution

For affiliated health professionals:	Provides	Charges
Internet training	<input type="checkbox"/>	<input type="checkbox"/>
Mediated searching	<input type="checkbox"/>	<input type="checkbox"/>
Onsite collection access	<input type="checkbox"/>	<input type="checkbox"/>
Online search training	<input type="checkbox"/>	<input type="checkbox"/>
Reference services	<input type="checkbox"/>	<input type="checkbox"/>

For unaffiliated health professionals:	Provides	Charges
Internet training	<input type="checkbox"/>	<input type="checkbox"/>
Mediated searching	<input type="checkbox"/>	<input type="checkbox"/>
Onsite collection access	<input type="checkbox"/>	<input type="checkbox"/>
Online search training	<input type="checkbox"/>	<input type="checkbox"/>
Reference services	<input type="checkbox"/>	<input type="checkbox"/>

For the public:	Provides	Charges
Internet training	<input type="checkbox"/>	<input type="checkbox"/>
Mediated searching	<input type="checkbox"/>	<input type="checkbox"/>
Onsite collection access	<input type="checkbox"/>	<input type="checkbox"/>
Online search training	<input type="checkbox"/>	<input type="checkbox"/>
Reference services	<input type="checkbox"/>	<input type="checkbox"/>

Done

Remember to click the **Save** button after completing each screen or your work will be lost!

II. DOCUSER Search/View

You can search DOCUSER to find directory, interlibrary loan, or network information about libraries that participate in DOCLINE and/or have membership in the NN/LM network.

To initiate a DOCUSER Search/View session:

Step 1. Log into DOCLINE (*see Module I for instructions*).

Step 2. Click **DOCUSER**.

Step 3. Click **Search/View** to view DOCUSER search parameters.

The screenshot shows a Netscape browser window displaying the DOCLINE website. The main navigation bar includes links for REQUESTS, DOCUSER, SERHOLD, LD, HELP, and HOME. The DOCUSER section is active, showing a 'Search/View' form. The form contains three search criteria, each with a 'Search in:' dropdown (all set to 'LIBID'), a 'Contains' dropdown, and an 'AND' dropdown. Below these are two 'Only if:' dropdowns. The 'Display results as:' dropdown is set to 'Institution list' and the 'In order to:' dropdown is set to 'View records'. The 'Sort order:' dropdown is empty and the 'Records per page:' dropdown is set to '25'. At the bottom of the form are 'Search' and 'Reset' buttons. The browser's address bar shows the URL 'http://www.nlm.nih.gov/docline/login.cfm'.

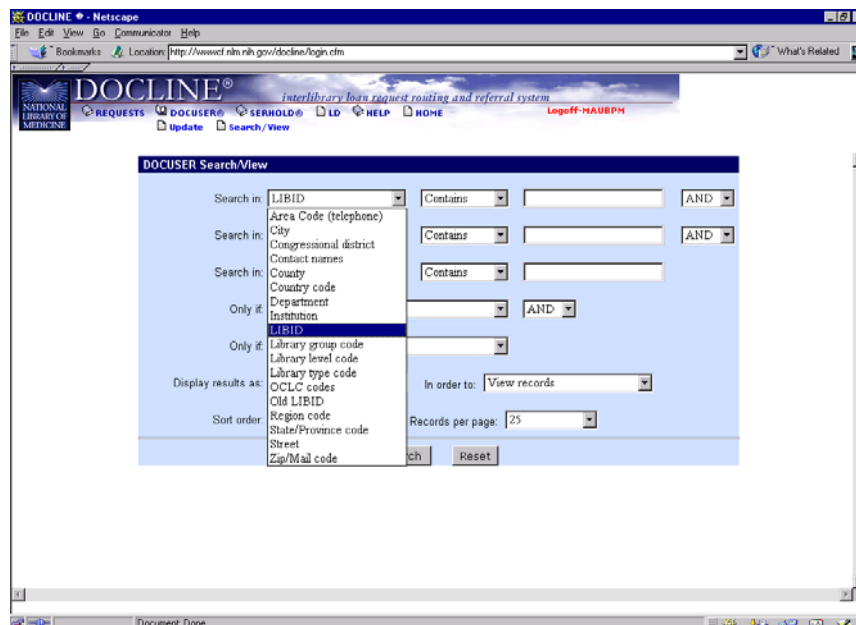


KEY NOTE

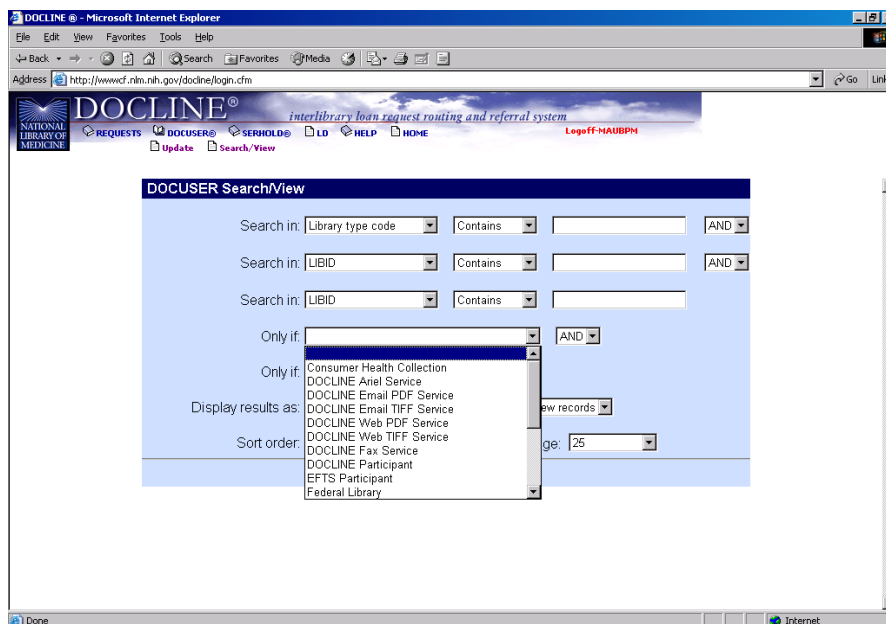
It is important to keep your DOCUSER record up-to-date, so the DOCLINE system works optimally for you and your colleagues. It is also important to keep your record current, so that other libraries can find correct information about your library.

II. DOCUSER Search/View

There are three (3) identical list boxes providing eighteen (18) possible search options. Highlight a selection to begin a search.

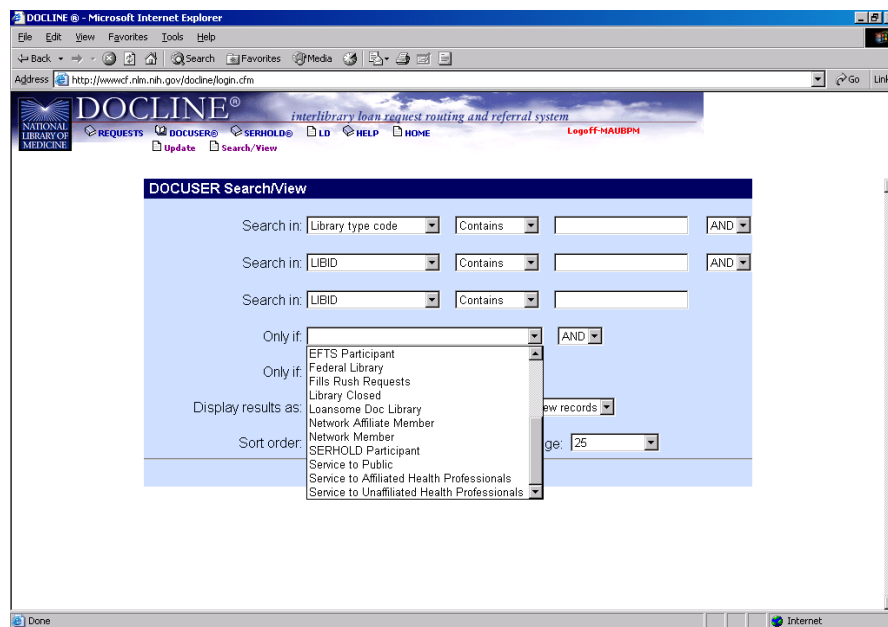


The "Only if" search lists (see below) provide for an additional nineteen (19) more options.

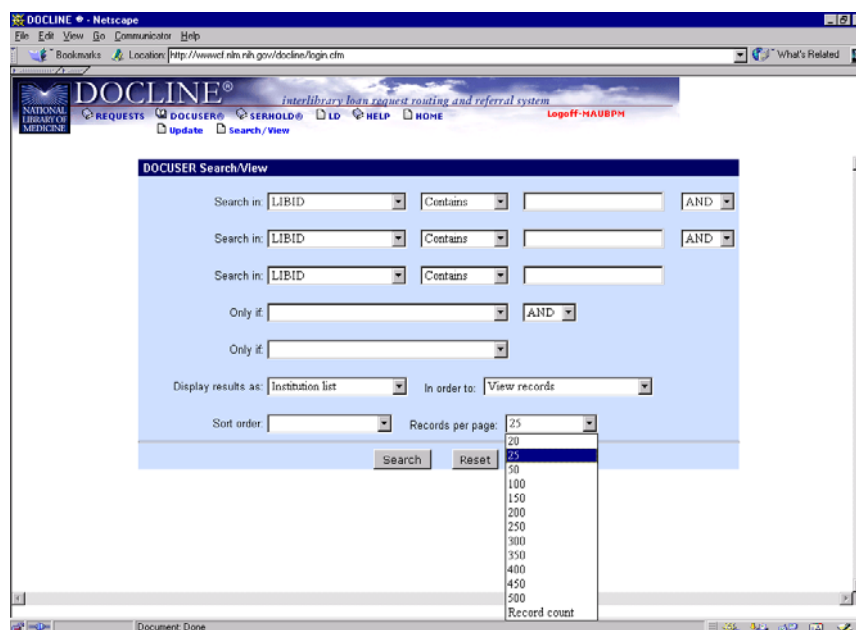


II. DOCUSER Search/View

Select the format for displaying results from this list. The default is "*Institution list*."



Select the count of your search results to display a full page at a time.



II. Exercises

1. How many institutions in Rhode Island are DOCLINE participants?
2. Find the serials holdings of *Freeshare* institutions located in New England.
3. How many Resource Libraries provide *Ariel* delivery?
4. How many BHSL libraries in Massachusetts participate in EFTS?
5. How many libraries in Maine listed are offering Loansome Doc services to unaffiliated health professionals?
6. How many health science libraries in Vermont hospitals offer Consumer Health collections?
7. How many libraries in Maine listed are offering Loansome Doc services to unaffiliated health professionals?
8. If you offer services to unaffiliated health professionals (and/or the general public), where in your DOCLINE record can that information be found?
9. Where do you establish default values for your “borrows?”
10. Can you prevent a request from routing to NLM?



II. Answers to Exercises

1. How many institutions in Rhode Island are DOCLINE participants? **20**
Search in: State/Province Code -- Rhode Island (RI)
Only if: DOCLINE Participant
2. Find the serials holdings of *Freeshare* institutions located in New England.
Search in: Region Code -- 08
Search in: Library group code -- Freeshare
3. How many Resource Libraries provide *Ariel* delivery? **11**
Search in: Library Level Code
Only if: DOCLINE Web PDF Service
4. How many BHSL libraries in Massachusetts participate in EFTS? **24**
Search in: State/Province Code -- Massachusetts (MA)
Search in: Library group code -- BHSL
Only if: Electronic Payment
5. How many libraries in Maine listed are offering Loansome Doc services to unaffiliated health professionals? **16**
Search in: State/Province Code -- Maine (ME)
Only if: Loansome Doc Library
Only if: Unaffiliated Health Professionals
DispResults: LD Information
6. How many health science libraries in Vermont hospitals offer Consumer Health collections? **4**
Search in: State/Province Code -- Vermont (VT)
Only if: Library Level Code -- Primary Access (PA)
Only if: Consumer Health Collection
DispResults: Consumer Health
7. How many libraries in Maine listed are offering Loansome Doc services to unaffiliated health professionals? **16**
Search in: State/Province Code -- Maine (ME)
Only if: Loansome Doc Library
Onli if: Unaffiliated Health Professionals
DispResults: LD Information
8. If you offer services to unaffiliated health professionals (and/or the general public), where in your DOCLINE record can that information be found?
DOCUSER | Services Tab | Service Category -- Service Profile
9. Where do you establish default values for your "borrows?"
DOCUSER | Interlibrary Loan Tab | ILL Info Category -- Routing Profile
10. Can you prevent a request from routing to NLM?
 Make sure "Refer on after NLM" is left unchecked

MODULE III. REQUESTS*Table of Contents*

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III. Borrow Requests via PubMed

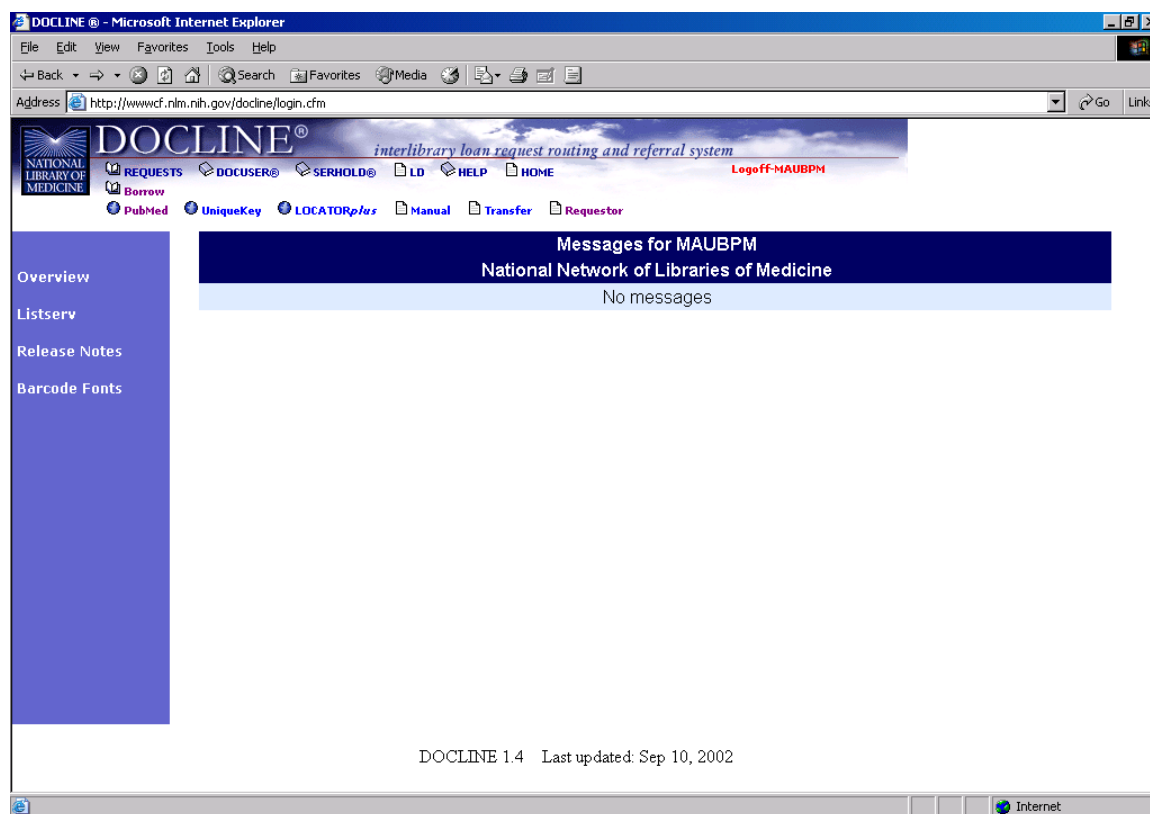
DOCLINE participants can create, edit, route, receive and fill requests. They can also check the status of requests, whether they are the "borrowing" or "lending" library.

To initiate a Borrow Request for a journal article:

Step 1. Log into DOCLINE (*see Module I for instructions*).

Step 2. Click **REQUESTS**.

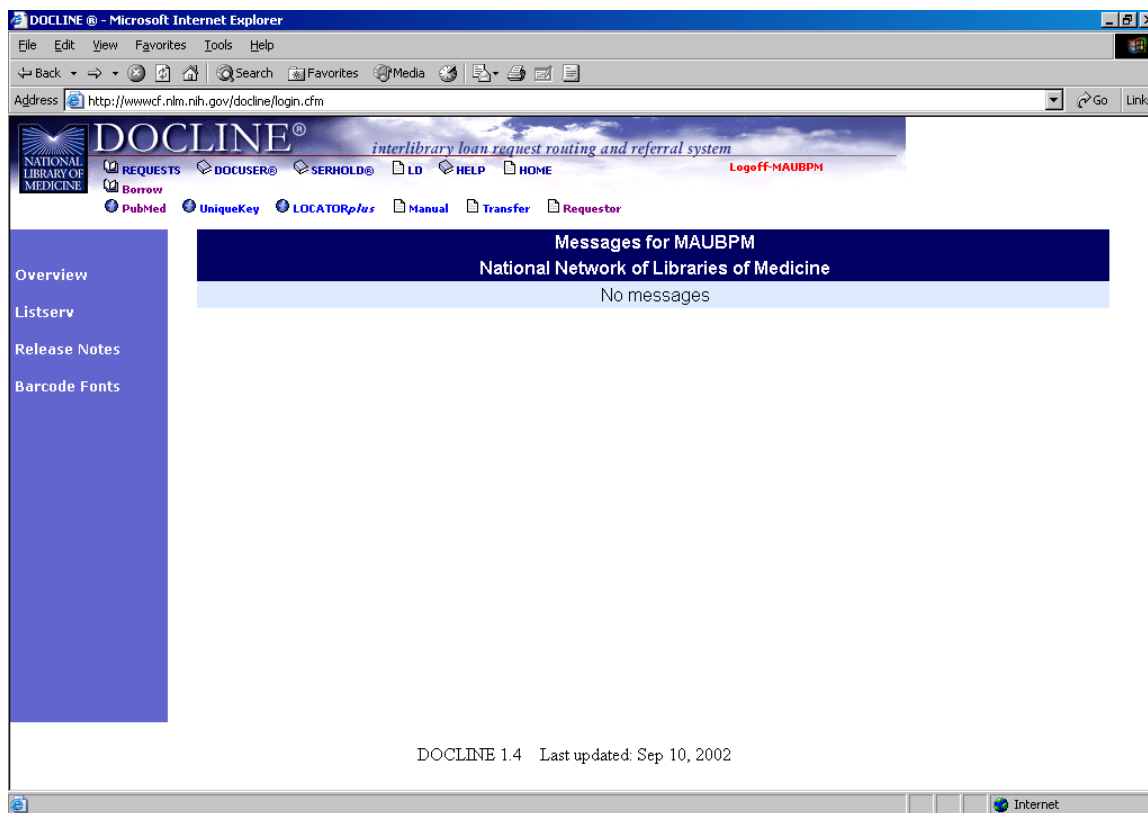
Step 3. Click **Borrow**.



Step 4. There are different search features to choose from to generate a request:

- PubMed
- UniqueKey
- LOCATORplus
- Manual

III. Borrow Requests via PubMed



KEY NOTE

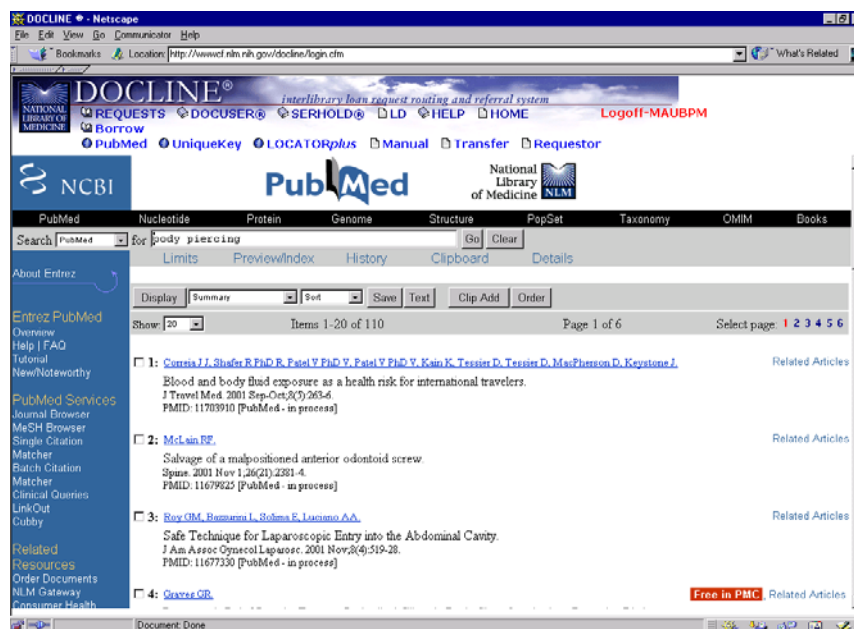
It is recommended that you submit requests using the PubMed, UniqueKey or LOCATORplus search features. These features take advantage of NLM's "unique identifiers" that provide links to the SERHOLD file. SERHOLD contains serial holdings information for all of the DOCLINE libraries. This information makes it possible to automatically route requests to libraries that own the journal items that are being requested. (See Module IV.)

III. Borrow Requests via PubMed

With DOCLINE's PubMed search feature, you can initiate a PubMed session, use the Citation Matcher or conduct a search. [Please note that you are still operating within a DOCLINE session, see below.]

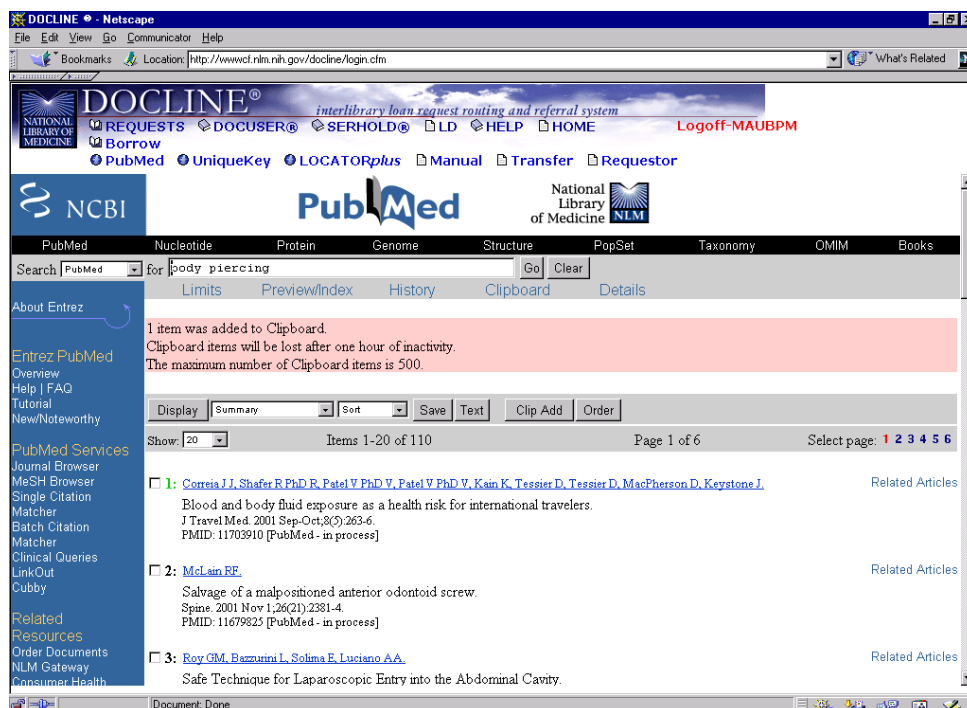


You can use PubMed to create a DOCLINE request by checking off the boxes to the left of one or more items. When you have finished selecting, just click the **Order** button.



III. Borrow Requests via PubMed

PubMed's Clipboard feature allows you to save journal citations to batch "borrow requests." You can use this feature by selecting citations, then clicking the **Clip Add** button. When you're ready to create requests, click the **Order** button.

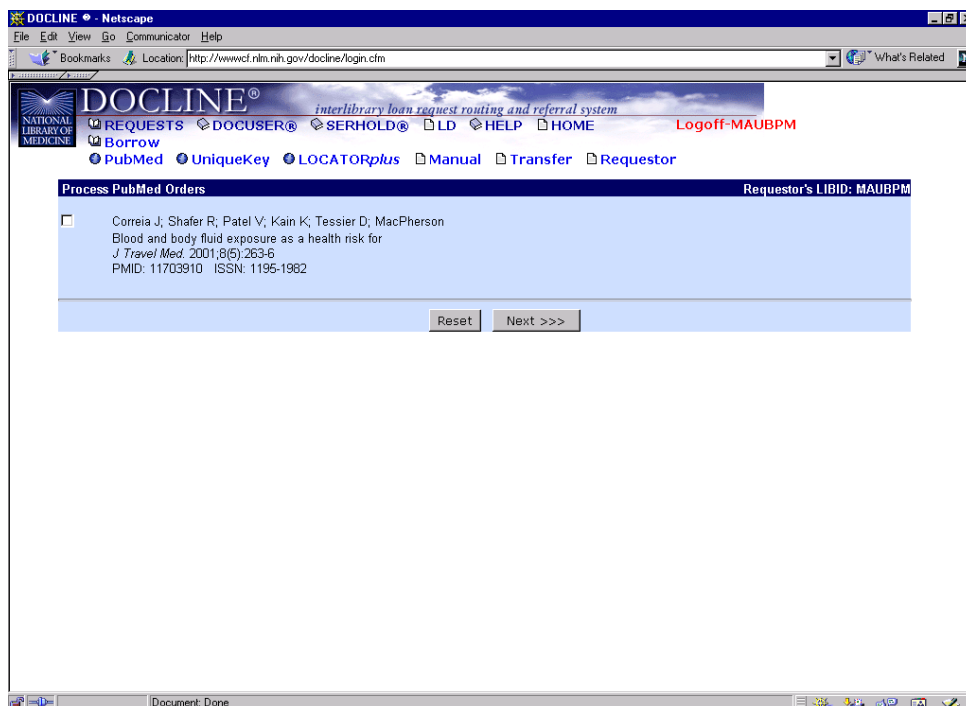


A CLOSER LOOK

- Reference numbers for selected citations turn "green" when they are added to the Clipboard.
- The *Clipboard* feature supports storage for a maximum of 500 items.
- Clipboard items will be lost after **one hour** of inactivity.
- LOCATORplus will reference monographs as well as journals.
- PubMed references over 4,000 journals.
- If you do not locate a journal article during a PubMed search, search LOCATORplus.
- NLM has the largest biomedical library in the world!

III. Borrow Requests via PubMed

References for the journal citations that were selected have moved from PubMed into DOCLINE. Now it is time to select individual references for borrowing by checking off the empty boxes next to items, or by clicking the **Next** button to borrow all of the references listed.



III. Borrow Requests via PubMed

Most of the information displayed on the *Routing Instructions* screen should already be stored in the DOCUSER record (see Module II for an explanation of setting up your Routing Profile.) You may change the value of fields on this screen without altering the default information stored in DOCUSER.

The following fields are NOT defaults and should be completed for processing the request:

- Form
- Copyright Compliance
- Referral Reason
- Prefix LIBID
- Route Cells
- Refer to Resource Libraries
- Refer on after NLM

The screenshot shows the DOCLINE web interface in a Netscape browser window. The page title is "DOCLINE - Netscape". The browser's address bar shows "http://www.nlm.nih.gov/docline/login.cfm". The DOCLINE logo is at the top left, with the tagline "interlibrary loan request routing and referral system". Navigation links include REQUESTS, DOCUSER, SERHOLD, LD, HELP, HOME, Borrow, PubMed, UniqueKey, LOCATORplus, Manual, Transfer, and Requestor. A "Logoff-MAUBPM" link is on the right. The main form is titled "Routing Instructions" and includes a "Requestor's LIBID: MAUBPM" label. The form fields are: Form (Copy), Copyright Compliance (Guidelines), Maximum Cost (\$11.00), Comments (DO *NOT* FILL -- FOR DOCLINE TRAINING ONLY!!), Authorized By (Mark), Referral Reason (dropdown), Network Delivery (ARIEL), NLM Delivery (ARIEL), Patron Name, Need By Date (MMDDYYYY), Phone (Country Code 1, Area/City Code 508, Local Number 856-5964, Extension), Fax (Country Code 1, Area/City Code 508, Local Number 856-5977, Extension), Email (mark.goldstein@umassmed.edu), Ariel (123.456.6789), Prefix LIBID, Route Cells (1 checked, 2-9 unchecked), Refer to Resource Libraries (checked), Refer on after NLM (checked), and a Deselect All button. Navigation buttons at the bottom are <<< Prev, Reset, and Next >>>.

Click the **Next** button to go to the *Delivery Address* screen.

III. Borrow Requests via PubMed

If you want the item sent directly to the requestor, enter it here. Otherwise, leave your library's address in place.

DOCLINE® interlibrary loan request routing and referral system

REQUESTS DOCUSER® SERHOLD® LD HELP HOME Logoff-MAUBPM

Borrow PubMed UniqueKey LOCATORplus Manual Transfer Requestor

Delivery Address Requestor's LIBID: MAUBPM

Ship to Name	National Network of Libraries of Medicine
Department	New England Region
Street	222 Maple Ave.
City	Shrewsbury
State/Province (U.S. or Canada)	Massachusetts
State/Province (Other)	
Zip/Mail Code	01545-2732
Country	USA

<<< Prev Reset Finish

Click the **FINISH** button to send your request on its way!



III. Borrow Requests via UniqueKey

Select the DOCLINE UniqueKey Search feature for borrow requests when you know the PubMed identifier (PMID) or the MEDLINE Identifier (UI).

The screenshot shows a Netscape browser window with the address bar displaying <http://www.nlm.nih.gov/docline/login.cfm>. The DOCLINE logo is at the top left, with the tagline "interlibrary loan request routing and referral system". Navigation links include REQUESTS, DOCUSER®, SERHOLD®, LD, HELP, HOME, Borrow, PubMed, UniqueKey, LOCATORplus, Manual, Transfer, and Requestor. A "Logoff-MAUBPM" link is also present. The "Unique Key" section is highlighted, showing a "Search PubMed (One or more)" option. A text input field contains the UID(s) "10600922, 106336729, 5209774", followed by a "Search" button. Below this, a note states "UIDs include the PubMed identifier (PMID) and MEDLINE identifier (UI). (i.e. 10636776, 10636729)". An "OR" separator is shown, followed by a "Search LOCATORplus (One at a time)" option. A "Select Key:" dropdown menu is set to "NLM Unique ID", with an empty text input field and a "Search" button next to it. The status bar at the bottom indicates "Document: Done".

You can enter up to eleven (11) PMID's or UI's, separated by commas.

III. Borrow Requests via UniqueKey

PMID's or UI's entered into via the UniqueKey screen will generate a citation list similar to the one that was created with the PubMed Search feature. Select individual references to be ordered by checking off empty boxes next to items, or click the **Next** button to order all of the items on the list. Complete the routing information, and again click the **Next** button to display the *Delivery Address* screen.

DOCLINE® interlibrary loan request routing and referral system

Logoff-MAUBPM

Process PubMed Orders Requestor's LIBID: MAUBPM

☐ Holden C
NIMH. Mental health agency shrugs off critics.
Science 1999;286(5448):2248
PMID: 10636776 ISSN: 0036-8075

Reset Next >>>

DOCLINE® interlibrary loan request routing and referral system

Logoff-MAUBPM

Routing Instructions Requestor's LIBID: MAUBPM

Form Copy Copyright Compliance Guidelines Maximum Cost \$ 11.00

Comments DO *NOT* FILL -- FOR DOCLINE TRAINING ONLY!!

Authorized By Mark Referral Reason

Network Delivery ARIEL NLM Delivery ARIEL

Patron Name Need By Date (MMDDYYYY)

Phone Country Code 1 Area/City Code 508 Local Number 856-5964 Extension

Fax Country Code 1 Area/City Code 508 Local Number 856-5977 Extension

Email mark.goldstein@unasmmed.edu

Ariel 123.456.6789

Prefix LIBID Route Cells ☒ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9

Refer to Resource Libraries ☒ Refer on after NLM ☒ Deselect All

<<< Prev Reset Next >>>

III. Borrow Requests via UniqueKey

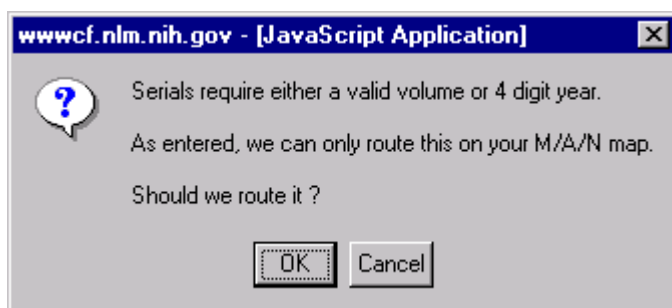
If you do not know a journal article's PMID (or UI), you can also use the UniqueKey Search feature to find a bibliographic record for a journal listed in NLM's LOCATORplus database. You may enter a journal title abbreviation, an NLM UI, an ISSN or an OCLC number.

UniqueKey fills in the bibliographic information about the journal, but you must then complete the citation for the specific journal article for which you want to create a borrow request.

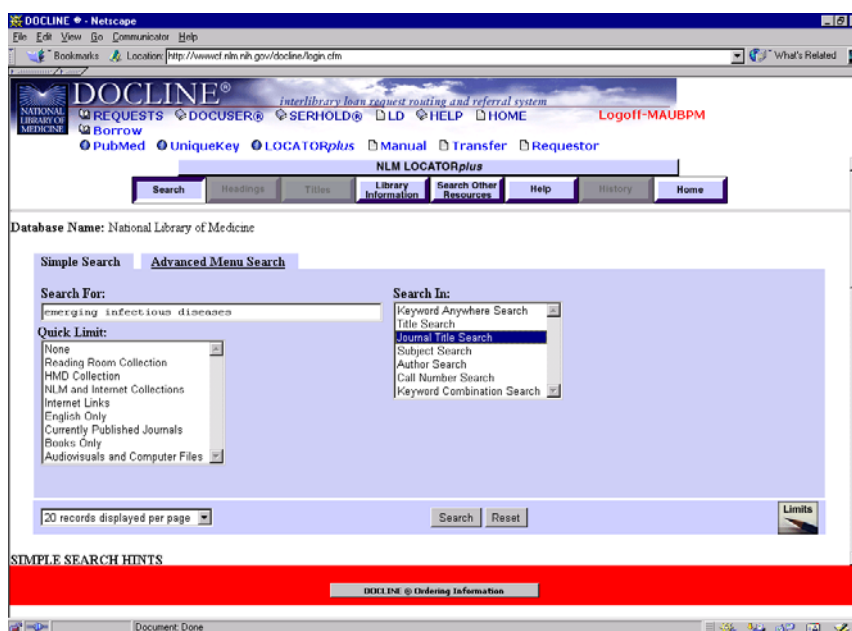
Enter the article title in the **Part Title** field and the article's author in the **Part Author** field (see above). Then provide the **Year, Volume, Issue** (if known) and **Pages**. Click the **Next** button to go to the *Routing Instructions* and *Delivery Address* screens.

III. Borrow Requests via the LOCATORplus

If you leave the Update portion of the screen blank and click on the **Next >>>** button, a message box (see below) will pop up on your screen prompting you either for entry of a Volume or Year. If you then click the **OK** button, the *Routing Instructions* screen will display. [Please note that in the absence of complete citation information, the request will route via the M/A/N map, not automatically via SERHOLD.]



If you do not know: (a.) a journal's title abbreviation; (b.) the NLM UI; (c.) the ISSN; or (d.) the OCLC number, use the LOCATORplus Search feature to find bibliographic information that can be moved from NLM's catalog into DOCLINE.



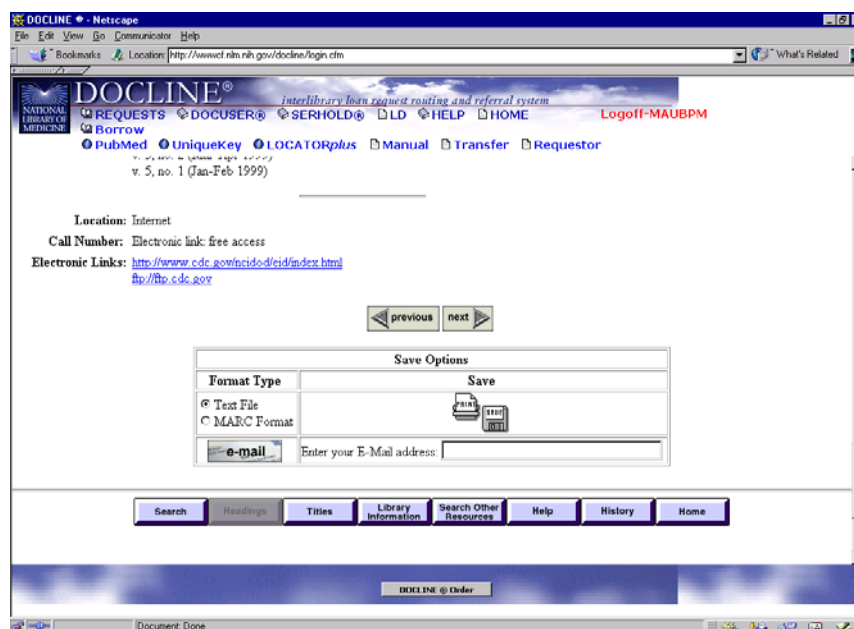
III. Borrow Requests via the LOCATORplus

The quickest way to find a journal in LOCATORplus is to search by journal title; Select/Highlight **Journal Title Search** under the "Search In:" list box and enter the actual title under the "Search For:" list box. LOCATORplus will display bibliographic information.

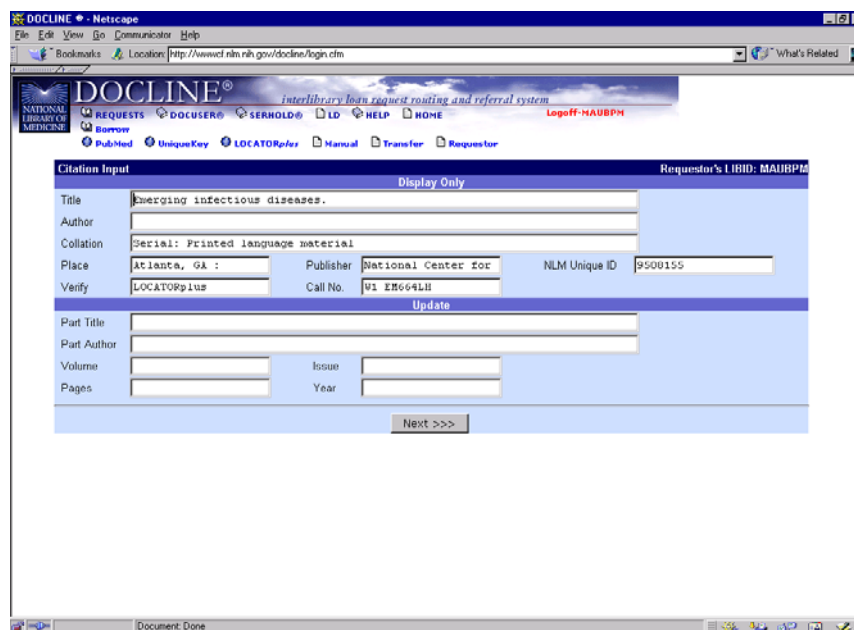


III. Borrow Requests via the LOCATORplus

Scroll down to the bottom of your retrieval record. Select the **Save** option that works best for you: (a.) printed; (b.) saved (as a file stored to floppy disk); or (c.) saved as a text file and sent to your E-mail inbox over the web.



Click on the **DOCLINE Order** button at the bottom of the screen and the *Routing Instructions* screen is displayed, followed by the *Delivery Address* screen, and finally -- the *Request Confirmation* screen.



III. Borrow Requests via the Manual Search

The Manual Search feature generates a blank *Citation Input* form. You must provide the whole citation.

DOCLINE® interlibrary loan request routing and referral system

Logoff-MAUBPM

REQUESTS DOCUSER® SERHOLD® LD HELP HOME

Borrow UniqueKey LOCATORplus Manual Transfer Requestor

Requestor's LIBID: MAUBPM

Citation Input

Title: Proceedings of the National Convention on Indian Health

Author:

Part Title: Discussion on Trachoma

Part Author: Thygeson P, et al.

Collation:

Place:

Volume: 3

NLM Unique ID:

Type: Journal

Publisher:

Issue:

Year: 1964

Pages: 43-82

Call No.:

Verify: Manual

ISSN/ISBN:

Next >>>

Click the **Next** button when you have completed the form and proceed to the *Routing Instructions* screen. Remember: manual requests route according to your M/A/N map (as defined in DOCUSER); requests will route only to the four large libraries listed, plus NLM.

DOCLINE® interlibrary loan request routing and referral system

Logoff-MAUBPM

REQUESTS DOCUSER® SERHOLD® LD HELP HOME

Borrow UniqueKey LOCATORplus Manual Transfer Requestor

Requestor's LIBID: MAUBPM

Routing Instructions

Form: Copy Copyright Compliance Guidelines Maximum Cost \$ 11.00

Comments: DO NOT FILL -- FOR DOCLINE TRAINING ONLY!!

Authorized By: Mark Referral Reason:

Network Delivery: ARIEL NLM Delivery: ARIEL

Patron Name: Need By Date: (MMDDYYYY)

Phone: Country Code: 1 Area/City Code: 500 Local Number: 056-5964 Extension:

Fax: Country Code: 1 Area/City Code: 500 Local Number: 056-5977 Extension:

Email: mark.goldstein@unm.edu

Ariel: 123.456.789

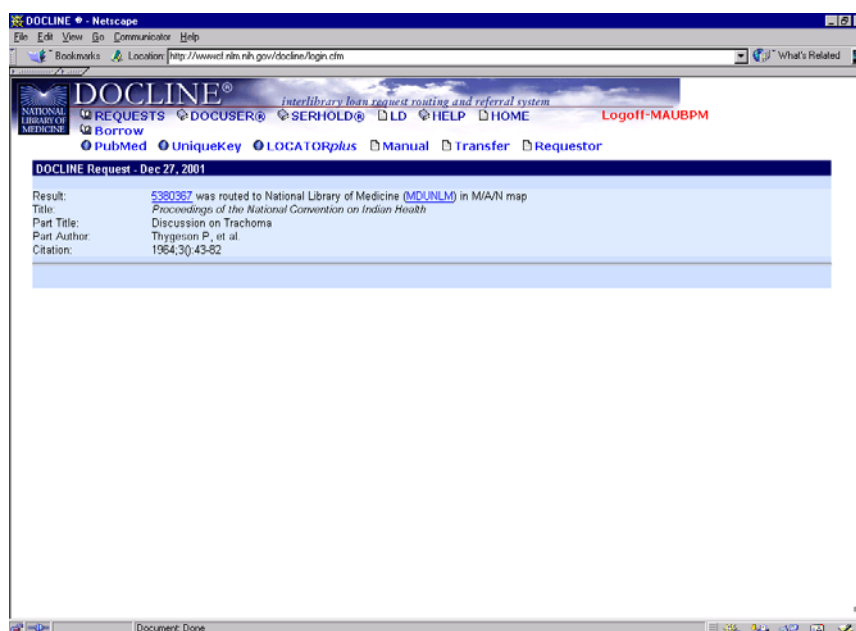
M/A/N Map: NYOIGNR INDUSRL UTBRPF CAUPSR

<<< Prev Reset Next >>>

III. Borrow Requests via the Manual Search

Click the **Next** button and proceed to the *Delivery Address* screen. Then, click the **Finish** button on the *Delivery Address* screen and your request is on its way!

DOCLINE displays a *Request Confirmation* screen that informs you which libraries have received your request (*see below.*)



All borrow requests and their history can be viewed online via the the *Status/Cancel* Feature (*see III-"Eye", below.*) Information about requests is maintained by the system for **40 days** after the request has been filled, cancelled or retired.



A CLOSER LOOK

- The Manual Search feature for borrow requests should only be used as a last resort (i.e., only if you cannot find a journal article via the PubMed, UniqueKey, or LOCATORplus.)
- Manual requests lack Unique Identifiers and cannot be linked to SERHOLD. DOCLINE has no holdings about these requests, so they do NOT route automatically to those libraries owning the requested items.
- Manual requests -- even those for journal articles -- route according to your library's M/A/N map (Monograph/Audiovisual/Nonserial), which is stored in your DOCUSER record. If your M/A/N Map is blank, requests will then be forwarded to NLM.

III. Borrow Requests for Monographs and Non-Serial Items

When creating a request for a copy of a monograph, or any other non-serial item, use the UniqueKey or LOCATORplus Search features (as outlined above.) These two Search features will save you time and effort by pulling the citation information into a request screen.

A request for a monograph or a non-serial item *WILL NOT ROUTE* automatically to a library that owns the item. Instead, it will route according to the M/A/N map stored in your library's DOCUSER record. If M/A/N map is left blank, the request is forwarded to NLM.

Automatic routing is based on SERHOLD, which is a list of serial holdings. Therefore, requests only for journal articles will route automatically.

When using the UniqueKey Search feature to create a request for a monograph, you can enter an NLM UI, an ISBN or an OCLC number to retrieve a bibliographic record from the NLM catalog.

The screenshot displays the DOCLINE web interface within a Netscape browser window. The browser's address bar shows the URL `http://www.nlm.nih.gov/docline/login.cfm`. The DOCLINE logo is at the top left, with navigation links for REQUESTS, DOCUSER, SERHOLD, LD, HELP, and HOME. A 'Logoff-MAUBPM' link is visible on the right. Below the navigation bar, there are links for Borrow, PubMed, UniqueKey, LOCATORplus, Manual, Transfer, and Requestor. The main content area is titled 'Unique Key' and includes a 'Requestor's LIBID: MAUBPM' label. It features two search options: 'Search PubMed (One or more)' with a text input for 'UID(s)' and a 'Search' button, and 'Search LOCATORplus (One at a time)' with a 'Select Key' dropdown menu and a text input. The dropdown menu is currently open, showing the following options: 'Journal Title Abbrev.', 'NLM Unique ID', 'ISSN', 'ISBN', 'OCLC', and 'Journal Title Abbrev.'. Below the search options, a note states: 'UIDs include the PubMed identifier (PMID) and MEDLINE identifier (UI). (i.e. 10636776,10636729)'. The browser's status bar at the bottom indicates 'Document: Done'.

III. Borrow Requests for Monographs and Non-Serial Items

DOCLINE places bibliographic information for the item into the *Citation Input* form (see below.) You cannot alter this information -- it is "Display Only".

III. Borrow Requests for Monographs and Non-Serial Items

If you want to request a copy of a chapter or a section, fill in the **Part Title**, **Part Author**, and **Pages** fields at the bottom half of the screen. If you want the whole item, leave these fields blank.

The screenshot shows the DOCLINE web interface in a Netscape browser window. The URL is <http://www.nlm.nih.gov/docline/login.cfm>. The page title is "DOCLINE® interlibrary loan request routing and referral system". The user is logged off as MAUBPM. The "Citation Input" form is displayed, with the "Display Only" tab selected. The form contains the following fields:

Citation Input				Requestor's LIBID: MAUBPM	
Title	Trembling mountain : a personal account of kuru, cannibals, and mad cow dis				
Author	Klitzman, Robert.				
Collation	Monograph/item: Printed language material				
Place	New York :	Publisher	Plenum Trade,	NLM Unique ID	9803 625
Verify	Unique Key	Call No.	1998 J-903		
Update					
Part Title					
Part Author					
Volume		Issue			
Pages		Year	c1998.		
Next >>>					

Then, click the **Next** button.

The *Routing Instructions* screen appears, with information from your DOCUSER record filled in. Enter information in the **Referral Reason** and **Patron Name** fields, and make any necessary changes to information collected in the other fields. [Please note that these changes will NOT affect defaults defined for future transactions.]

DOCLINE • Netscape

File Edit View Go Communicator Help

Bookmarks Location: http://wwwet.rnh.nih.gov/docline/login.cfm What's Related

DOCLINE® interlibrary loan request routing and referral system

REQUESTS DOCUMER SERHOLD LD HELP HOME Logoff-NAUBPH

PatronMail UniqueKey LOCATORplus Manual Transfer Requestor

Routing Instructions Requestor's I ID: MAUBPH

Form Copy Copyright Compliance Guidelines Maximum Cost \$ 11.00

Comments DO *NOT* FILL -- FOR DOCLINE TRAINING ONLY!

Authorized By Back Referral Reason

Network Delivery ARIEL NLM Delivery ARIEL

Patron Name Need By Date (MMDDYYYY)

Phone Country Code 1 Area/City Code 500 Local Number 056-5964 Extension 1

Fax Country Code 1 Area/City Code 500 Local Number 056-5977 Extension 1

Email jwack.goldstein@unmanned.edu

Ariel 113.456.6709

M/A/N Map NTUGNR MDUSRL UTUBPF CAUPSR

<<< Prev Reset Next >>>

Then, click the **Next** button to bring up the *Delivery Address* screen.

DOCLINE - Netscape

File Edit View Go Communicator Help

Bookmarks Location http://www.nlm.nih.gov/ocline/login.cfm

What's Related

DOCLINE® *interlibrary loan request routing and referral system*

REQUESTS DOCLINE SEARCH LD HELP HOME Logoff-HAUBPH

PubMed UniqueKey LOCATORplus Manual Transfer Requestor

Delivery Address Requestor's LIBID: MAJBP

Ship to Name National Network of Libraries of Medicine

Department New England Region

Street 222 Maple Ave.

City Shrewsbury

State/Province (U.S. or Canada) Massachusetts

State/Province (Other)

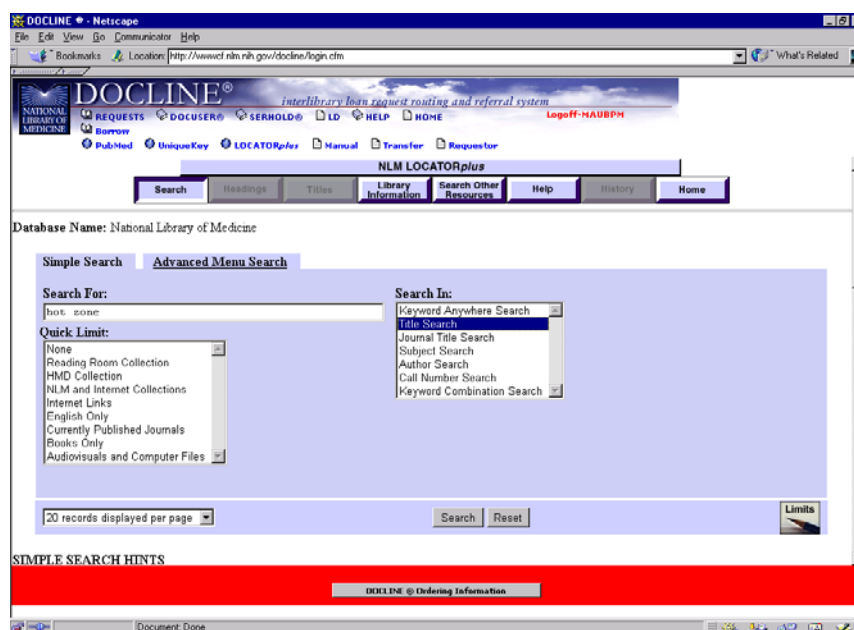
Zip/Mail Code 01545-2732

Country USA

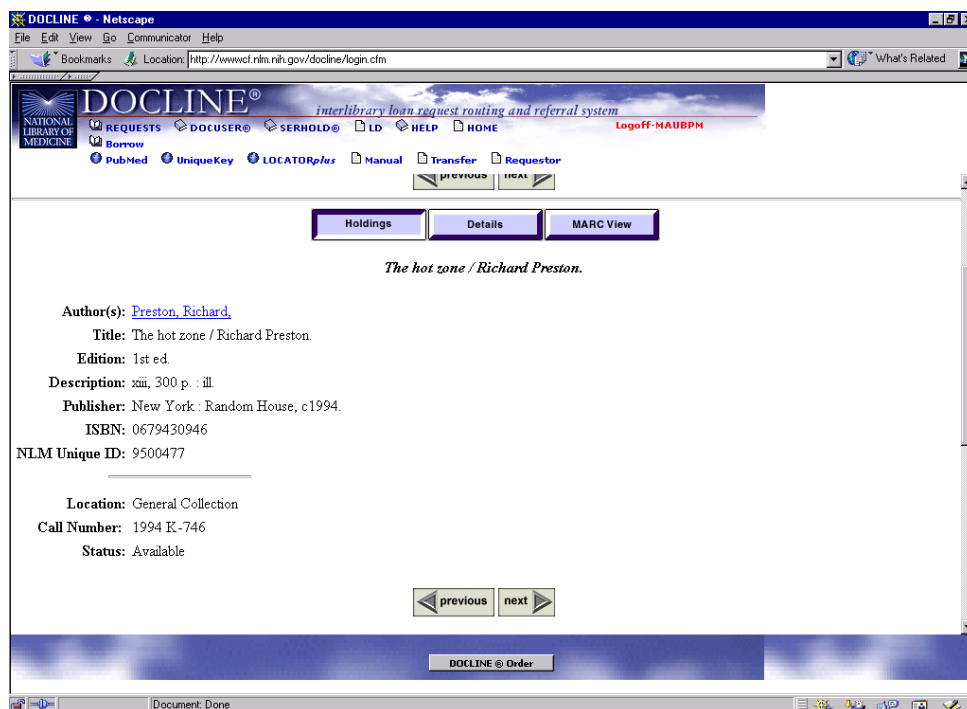
<<< Prev Reset Finish

III. Borrow Requests for Monographs and Non-Serial Items

If you do not know the NLM Unique Identifier, OCLC number, or ISBN, you can use LOCATORplus to create requests for monographs and other non-serial items.



All LOCATORplus features are available, but the default screen is "simple search". Begin with a title search. Click the **Search** button to bring up the bibliographic information.



III. Borrow Requests for Monographs and Non-Serial Items

Once you have found the item you want, click the **DOCLINE Order** button.

The screenshot shows the DOCLINE web interface in a Netscape browser. The page title is "DOCLINE® interlibrary loan request routing and referral system". The "Citation Input" form is displayed with a "Display Only" status. The form contains the following fields: Title (Not zone / Richard Preston), Author (Preston, Richard, 1954-), Collation (Monograph/item: Printed language material), Place (New York :), Publisher (Pandora House, NLM Unique ID 9500477), Verify (LOCATORplus), Call No. (1994 K-746), Part Title, Part Author, Volume, Pages, and Year (c1994). A "Next >>>" button is at the bottom right of the form.

DOCLINE places bibliographic information into a *Citation Input* form. You cannot alter this information -- it is "Display Only". Click the **Next** button to proceed to the *Delivery Address* screen to send the request.

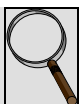
The screenshot shows the DOCLINE web interface in a Netscape browser. The page title is "DOCLINE® interlibrary loan request routing and referral system". The "Delivery Address" form is displayed with a "Requestor's LIBID: MAIBPM" status. The form contains the following fields: Ship to Name (National Network of Libraries of Medicine), Department (New England Region), Street (222 Maple Ave.), City (Shrewsbury), State/Province (U.S. or Canada) (Massachusetts), State/Province (Other), Zip/Mail Code (01545-2732), and Country (USA). Navigation buttons at the bottom include "<<< Prev", "Reset", and "Finish".

III. Borrow Requests for Monographs and Non-Serial Items

Click the **Finish** button and DOCLINE will confirm which library received your request.



You can print this screen for a printed (hard copy) record or click the Request Number for a complete copy of the request.



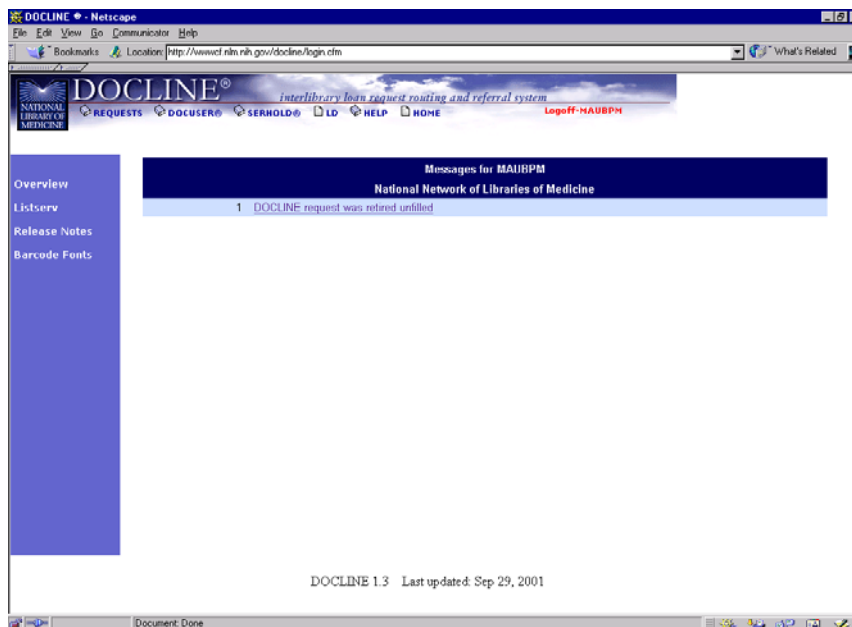
A CLOSER LOOK

- Requests for non-serial items will NOT be linked to a libraries' holdings in SERHOLD. Therefore, requests will NOT be routed automatically. This is why the *Routing Instructions* screen has displayed a M/A/N map rather than checkboxes for routing cells.
- All borrow requests can be viewed online via the DOCLINE's Status/Cancel feature, where you also find information about request history (see III-"Eye", below.)

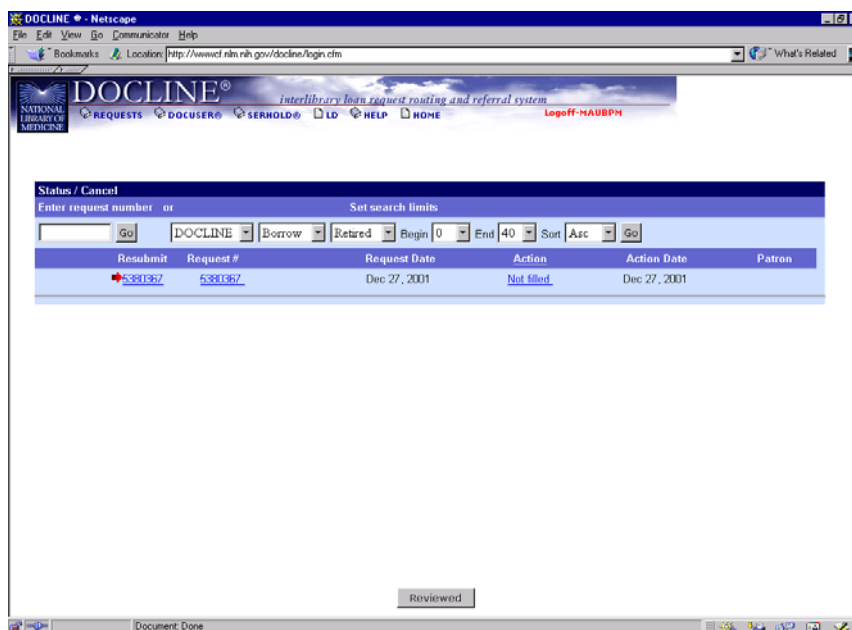
III. Resubmitting Unfilled Requests

Sometimes requests cannot be filled. These requests are returned to you as "*retired unfilled*" requests. You are notified with messages found on your DOCLINE Home Page. Click **HOME**.

To review retired unfilled requests, click the retired unfilled message link to retrieve the list.

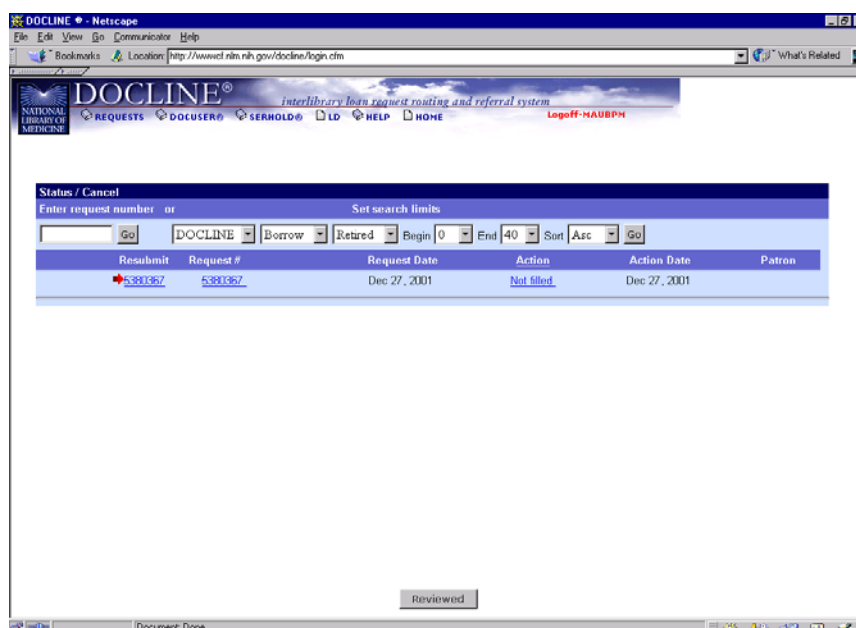


DOCLINE brings you to a *Status/Cancel* screen. It is a subset of the Status/Cancel feature, listing only unfilled requests.



III. Resubmitting Unfilled Requests

Here you review the requests and their histories. You can also resubmit requests, but first you should edit them (wherever possible) to give them a fresh chance to be filled.

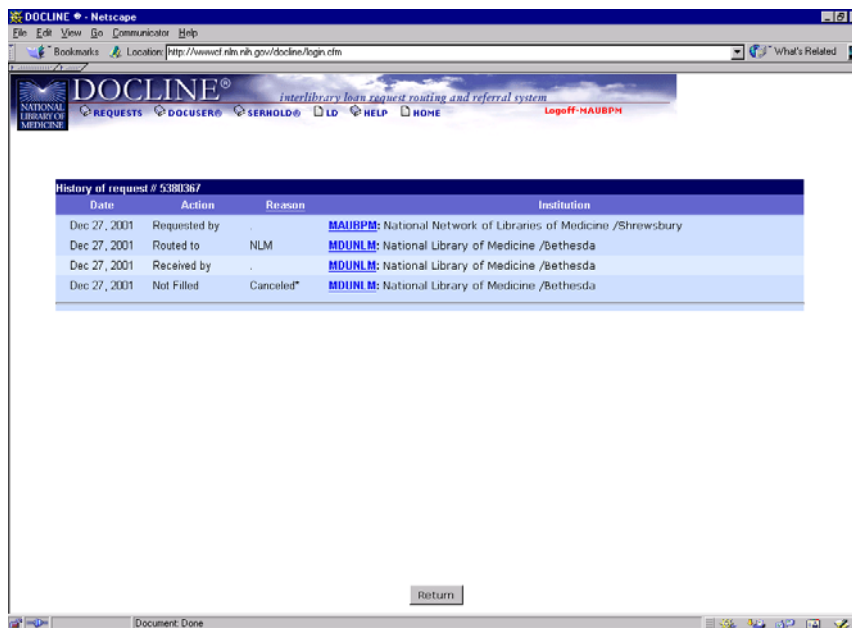


Check the **Request Number** to view the request.

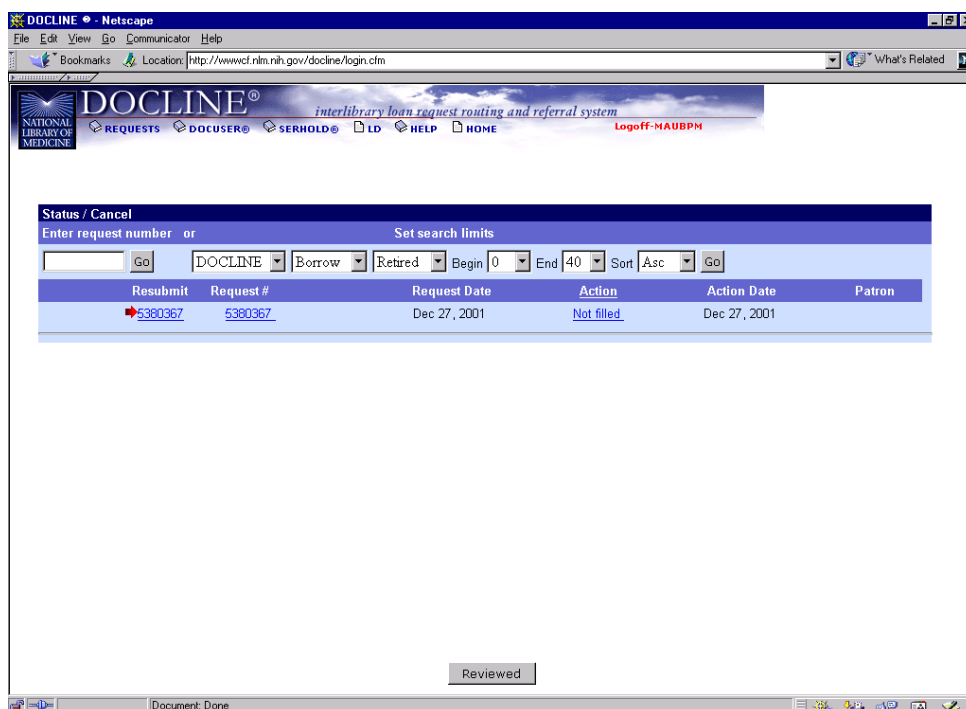


III. Resubmitting Unfilled Requests

Click the **Action** value link to view routing history.



Click the **Return** button to return to the *Status/Cancel* screen. Then, click on the **Resubmit** Number link to bring up the *Citation Information* screen.



III. Resubmitting Unfilled Requests

You can also review the request itself by checking the **Request** button, up above.

DOCLINE® interlibrary loan request routing and referral system
Logoff-NAUBPM

Resubmit 5380367: Not Filled (Canceled) Request History Help

Citation Information Requestor's LIBID: MAUBPM

Title	Proceedings of the National Convention on Indian Health		
Author			
Part Title	Discussion on Trachoma		
Part Author	Thygeson P, et al.		
Citation	1964;3(1):43-82		
Collation			
Place	Publisher	Year	1964
Volume	Issue	Pages	43-82
NLM Unique ID	Verify	Manual	Call No.

<<< Prev Reset Next >>>

Another new browser window opens up in which you can view the request.

requests status - Netscape

5380367

Request # 5380367 BORROW COPY DEC 27, 2001

Ariel To: 123.456.6789
National Network of Libraries of Medicine
New England Region
222 Maple Ave.
Shrewsbury, MA 01545-2732

DOCLINE: Journal Copy

Title: Proceedings of the National Convention on Indian Health
Citation: 1964;30:43-82
Article: Discussion on Trachoma
Author: Thygeson P, et al.
NLM Unique ID:
Publisher:
Verify: Manual
Copyright: Copyright Compliance Guidelines
Authorization: Mark
Need By: N/A

III. Resubmitting Unfilled Requests

You can review the request history by clicking the **History** button.

The screenshot shows the DOCLINE web interface in a Netscape browser window. The page title is 'DOCLINE - Netscape'. The address bar shows 'http://www.nlm.nih.gov/docline/login.cfm'. The page has a header with the DOCLINE logo and navigation links: REQUESTS, DOCUSER, SERHOLD, LD, HELP, HOME. A 'Logoff-MAUBPM' link is also visible. The main content area is titled 'Resubmit 5380367: Not Filled (Canceled*)' and has tabs for 'Request', 'History', and 'Help'. The 'Request' tab is active, showing a form for 'Citation Information'. The form fields are as follows:

Title	Proceedings of the National Convention on Indian Health		
Author			
Part Title	Discussion on Trachoma		
Part Author	Thygeson P, et al.		
Citation	1964;3 () :43-82		
Collation			
Place	Publisher	Year	1964
Volume	Issue	Pages	43-82
NLM Unique ID	Verify	Manual	Call No.

At the bottom of the form are buttons: '<<< Prev', 'Reset', and 'Next >>>'.

Another new browser window opens. Here you can see where the request was routed and what happened to it.

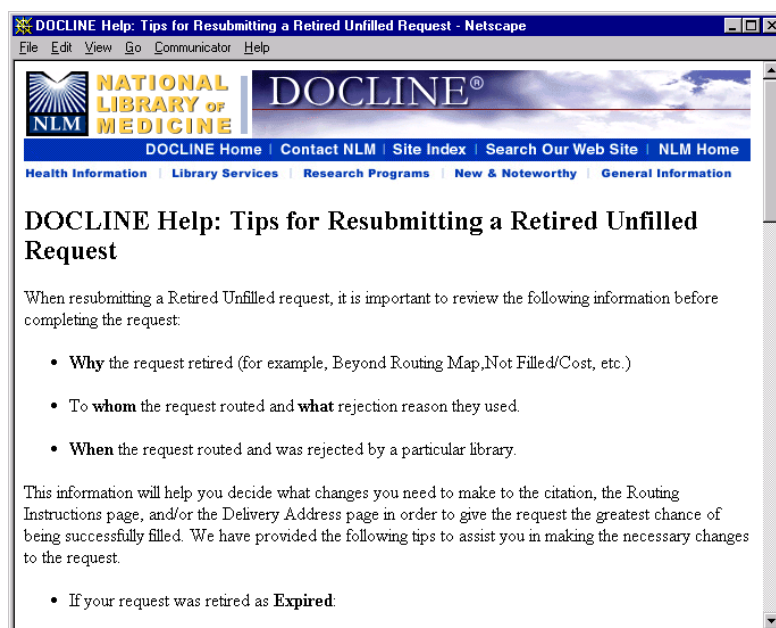
The screenshot shows a browser window titled 'requests status - Netscape'. The page displays the 'History of request # 5380367' in a table format:

Date	Action	Reason	Institution
Dec 27, 2001	Requested by		MAUBPM: National Network of Libraries of Medicine /Shrewsbury
Dec 27, 2001	Routed to	NLM	MDUHL: National Library of Medicine /Bethesda
Dec 27, 2001	Received by		MDUHL: National Library of Medicine /Bethesda
Dec 27, 2001	Not Filled	Canceled*	MDUHL: National Library of Medicine /Bethesda

Click one of the Institution links and take note of the information pulled in from the DOCUSER record (*such as*: Contact and Charges information.)

III. Resubmitting Unfilled Requests

You can review tips about resubmitting unfilled requests by clicking the **Help** button. Another browser window will open, linking directly to an NLM web site page.



Hit the **Next** button to proceed to the *Routing Instructions* screen.

The screenshot shows the DOCLINE web interface in a Netscape browser window. The page title is "DOCLINE - Netscape". The address bar shows "http://www.nlm.nih.gov/docline/login.cfm". The page header includes the NLM logo and the DOCLINE logo. Below the header is a navigation bar with links: REQUESTS, DOCLINE, SERHOLD, LD, HELP, HOME. The main content area is titled "Resubmit 5380367: Not Filled (Canceled)". It contains a form with the following fields:

- Form: Copy, Copyright Compliance, Guidelines, Maximum Cost \$ 11.00
- Comments: DO NOT FILL -- FOR DOCLINE TRAINING ONLY!
- Authorized By: Mack, Referral Reason: [dropdown]
- Network Delivery: ARIEL, NLM Delivery: ARIEL
- Patron Name: [text], Need By Date: [text] (MMDDYYYY)
- Phone: 1.508.856.5964
- Fax: 1.508.856.5977
- Email: [text]
- Area: 123.456.6789
- M/A/N Map: NYONR, MDUSRL, UTUOFF, CAMPSS

At the bottom of the form are buttons: <<< Prev, Reset, Next >>>.

III. Resubmitting Unfilled Requests

Hit the **Next** button to proceed to the *Delivery Address* screen and review the address.

DOCLINE® interlibrary loan request routing and referral system
Logoff-HAUBPH

Resubmit 5380367: Not Filled (Canceled?) Request History Help
Delivery Address Requestor's LIBID: MAUBPM

Ship to Name: National Network of Libraries of Medicine
Department: New England Region
Street: 222 Maple Ave.
City: Shrewsbury
State/Province (U.S. or Canada): Massachusetts
State/Province (Other):
Zip/Mail Code: 01545-2732
Country: USA

<<< Prev Reset Finish

Hit the **Finish** button and the next screen will be a confirmation of your resubmitted request. [Note that the request has been reassigned a new request number.]

DOCLINE® interlibrary loan request routing and referral system
Logoff-HAUBPH

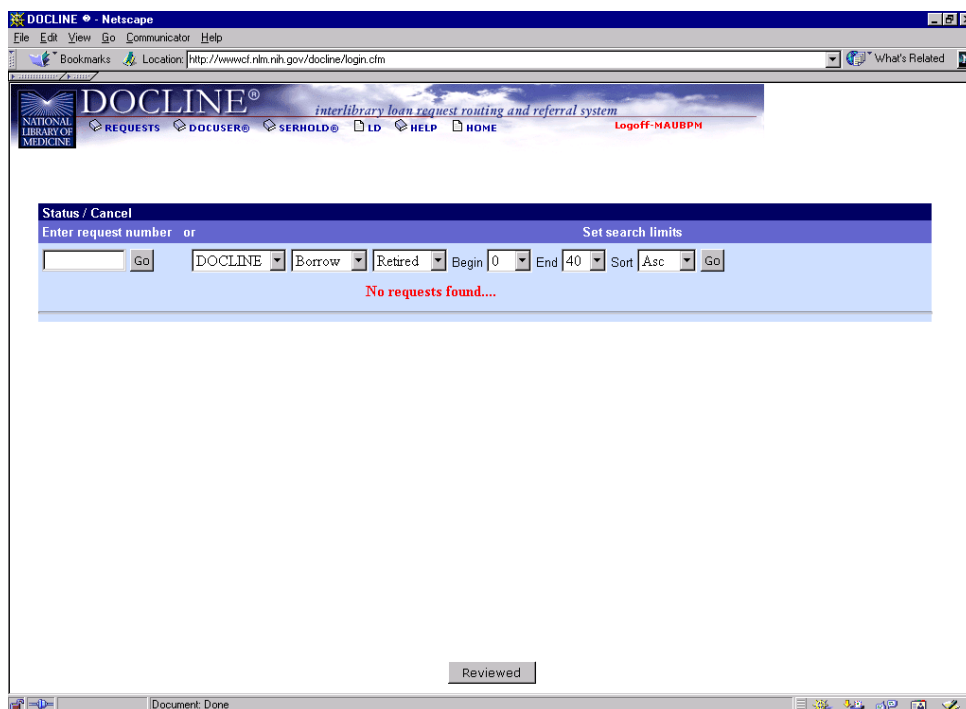
DOCLINE Request - Jan 15, 2002

Result: 5545557 was routed to National Library of Medicine (MDNLM)
Part Author: Thygeson P, et al.
Part Title: Discussion on Trachoma
Citation: Proceedings of the National Convention on Indian Health 1964;3(1):43-82

Return

III. Resubmitting Unfilled Requests

Click the **Return** button and you will notice there are no more requests in the queue awaiting resubmission.



Click the **Reviewed** button at the bottom of the screen to clear all items from the "*Retired Unfilled*" notice on your Home Page. [Please note that until you click this button, messages will continue to display on the Home Page.]



A CLOSER LOOK

- All retired unfilled requests remain available for display from the "Status/Cancel" feature on DOCLINE for 40 calendar days. The "Resubmit" feature is also available during this time.

III. Resubmitting Unfilled Requests

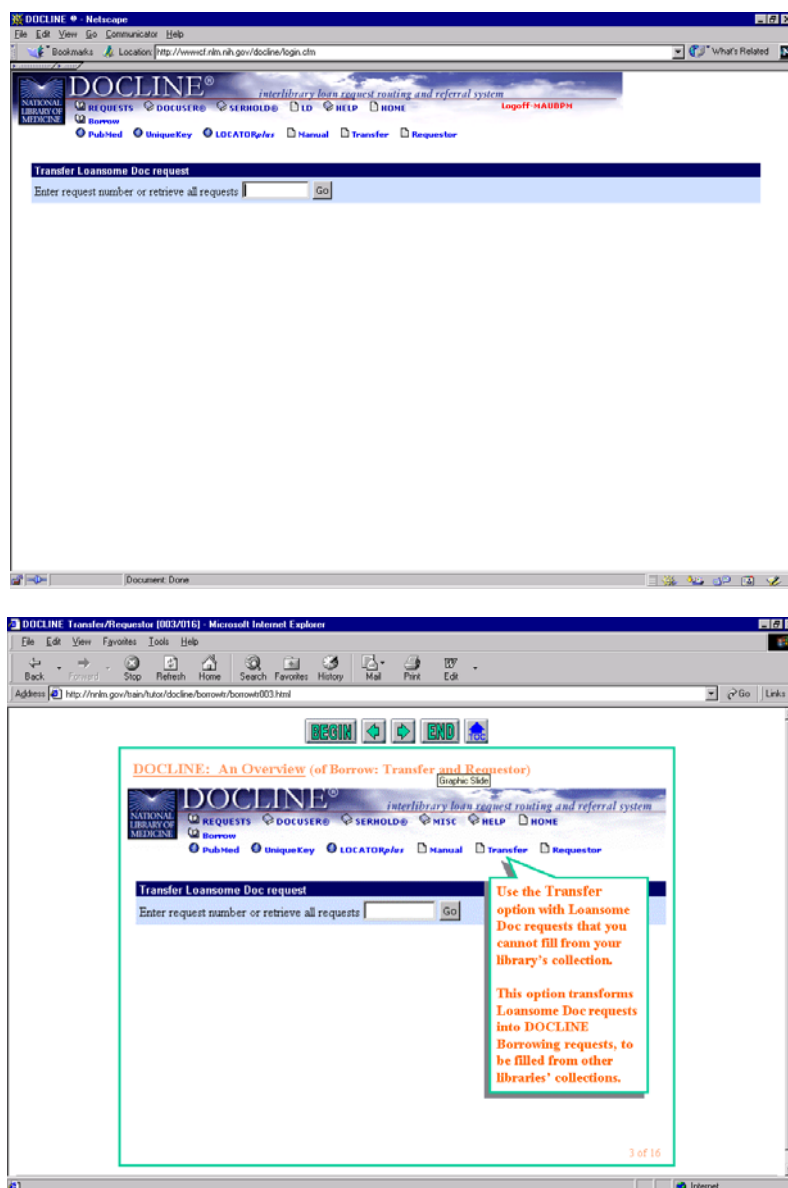
ACTION VALUE	REASON	MEANS	BEFORE RESUBMITTING
Beyond Routing Map		None of the potential lenders in your Routing Table could fill the request.	Click on the Action Value link to view history and see why your request was rejected. You may need to expand your population of potential lenders (e.g. checkbox for Resource Libraries on the DOCUSER <i>Routing Instructions</i> screen.)
Expired		Request had a "Need By" date that passed before request could be filled.	Change the "Need By" date.
Not Filled	Cancelled	Request not filled, due to cancellation; check history for reason or cause.	Click on the Action Value link to see why the request was not filled.
Not Filled	Copyright	Request not filled, due to Copyright Guidelines or Laws.	
Not Filled	Cost *	Library received request but would have charged more than you indicated you were willing to pay.	Request is automatically cancelled, since it is assumed the remaining "higher" routing cells would assess full charges. If you would be willing to pay more, click the Resubmit link and change the value for "Maximum Cost".
Not Filled	Not Yet Received	Journal article request is very new; no potential lender is yet available.	

III. Transfer Feature: Moving LD Requests into DOCLINE

Use the Transfer feature with Loansome Doc requests that you cannot fill from your library's collection. This DOCLINE® feature transforms Loansome Doc (LD) requests into DOCLINE Borrow requests

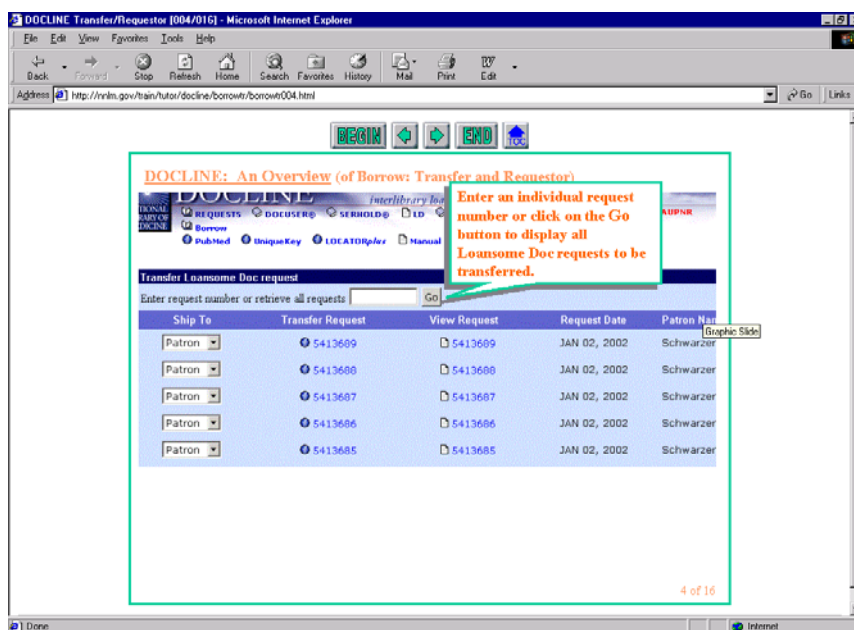
To Transfer of Loansome Doc Requests:

- Step 1. Log into DOCLINE (see Module I for instructions).
- Step 2. Click **REQUESTS**.
- Step 3. Click **Transfer**.

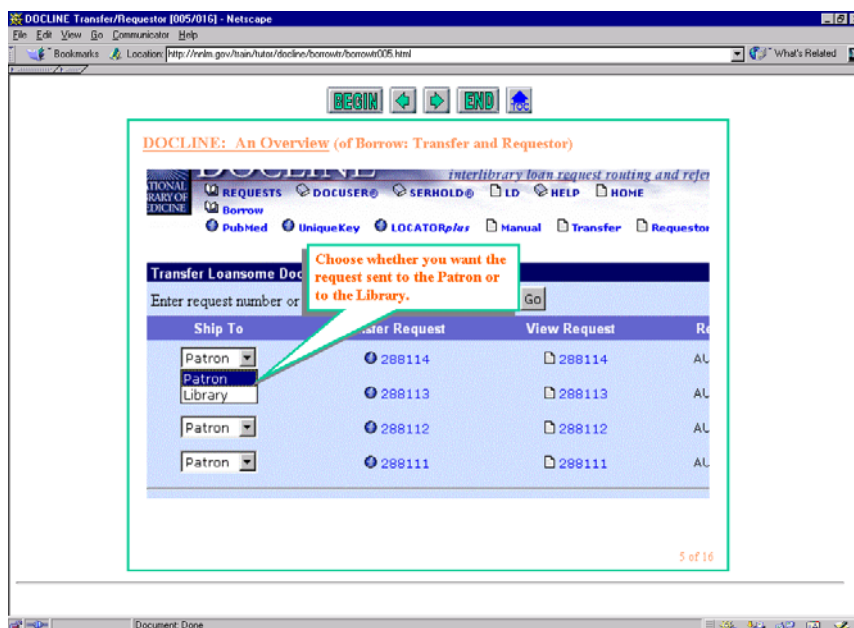


III. Transfer Feature: Moving LD Requests into DOCLINE

Enter an individual request number or click the **GO** button to display all of the LD requests to be transferred.



Choose whether you want the request sent to the Patron or to the Library.



III. Transfer Feature: Moving LD Requests into DOCLINE

To transfer a request into DOCLINE, click the Request Number link.

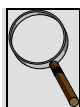
Routing Instructions and Delivery Address information is displayed together on the same screen. The library's phone number is displayed, but the fax number is that of the LD patron. You might wish to limit the number of libraries to which the LD request routes by leaving only the first few boxes checked.

III. Transfer Feature: Moving LD Requests into DOCLINE

The delivery address is taken from the LD patron's registration record and is usually the patron's address, but you can change this to the library's address.

When you are ready, click the **Finish** button to send request on its way!

DOCLINE then tells you which library received this request.



A CLOSER LOOK

- As the LD patron's "Ordering Library," you may decide to either fill or not fill a Loansome Doc request -- the librarian at the Ordering Library where the LD patron is registered can make the Transfer Request via the DOCLINE. Simply enter the Request Number and Click the **GO** button.

III. The Requestor Feature

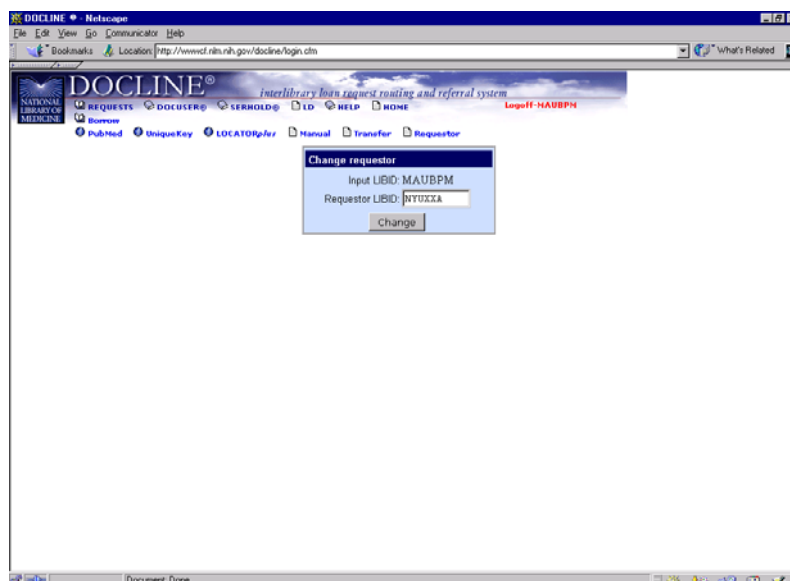
To borrow for another User/Library, use the Requestor feature.

To initiate the Requestor feature:

Step 1. Log into DOCLINE (*see Module I for instructions*).

Step 2. Click **REQUESTS**.

Step 3. Click **Requestor**.



Enter the Requestor's LIBID; click the **Change** button and the Requestor's routing map is used.

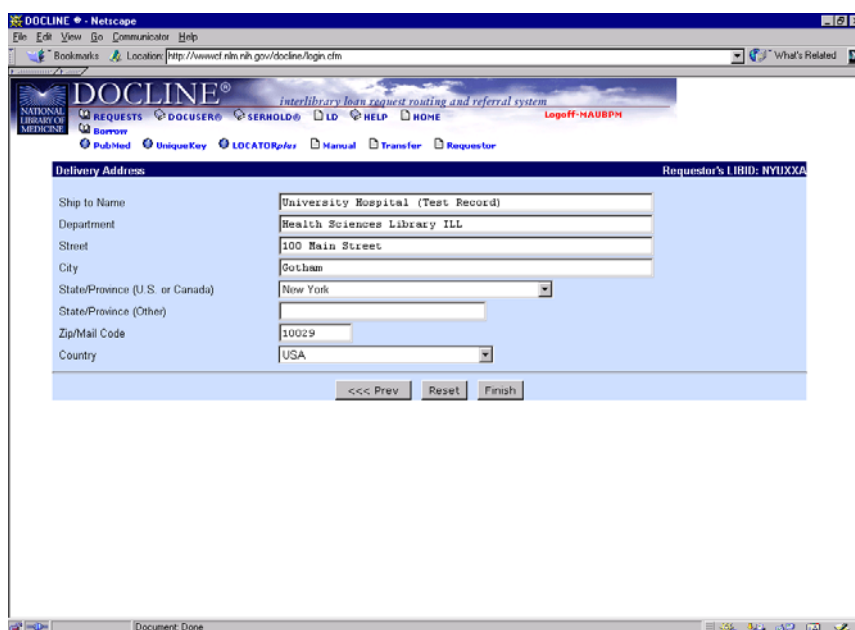


III. The Requestor Feature

Use any of the four Search features (outlined earlier in this module) to generate requests. Click the **Next** buttons to proceed to the *Routing Instructions* and *Delivery Address* screens.



Click the **Finish** button to send the request on behalf of another user/library.

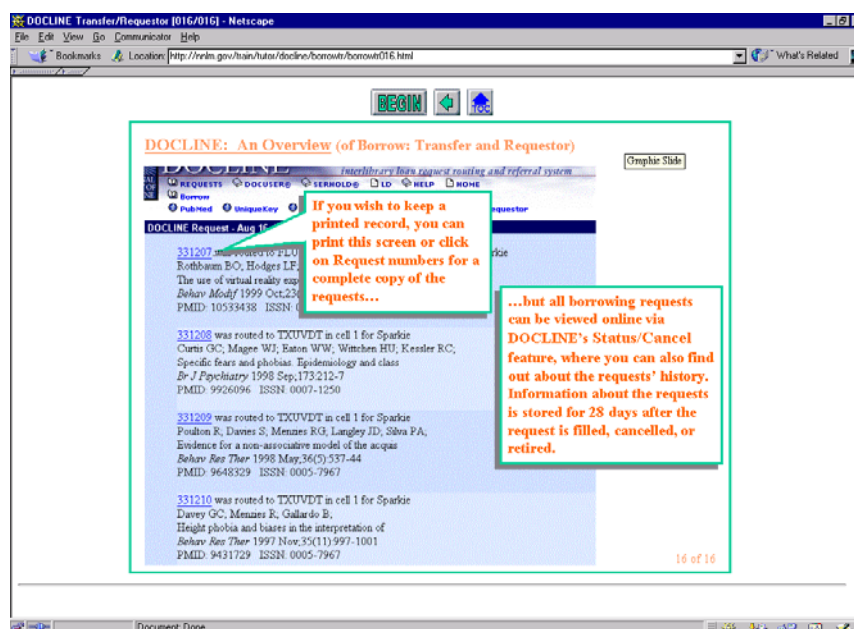


III. The Requestor Feature

DOCLINE will then tell you which libraries received the requests that you sent on behalf of the other library.



III. The Requestor Feature



Information on all borrowing requests are stored in the system for **40 days** after the request is filled, cancelled or retired.

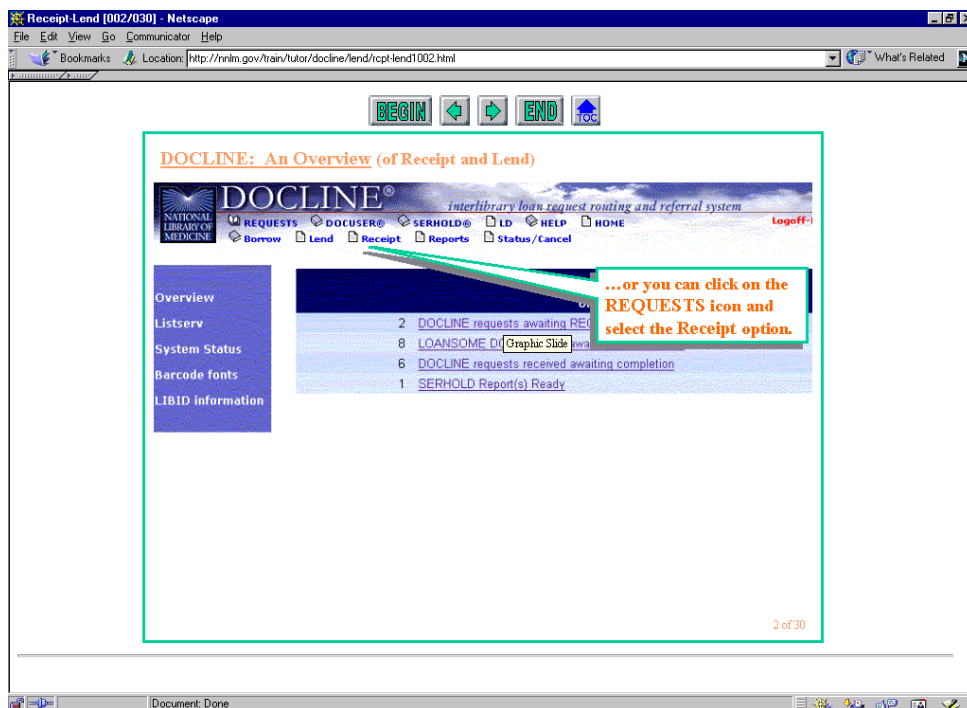
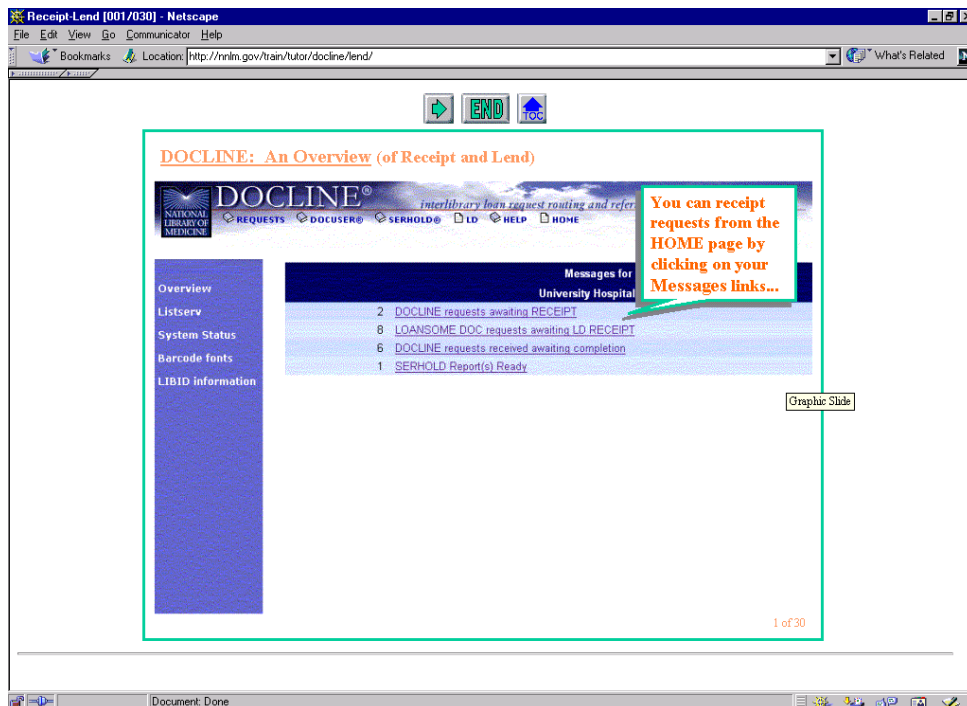


A CLOSER LOOK

- The Requestor feature is not in common usage; please avoid its use, unless you are making requests *on behalf of* another library, for example: you have a one-person library and the librarian is on vacation --or-- the library is temporarily out of commission. It is assumed that you would be using that library's routing map, acting "on their behalf."
- Please remember that you can temporarily suspend DOCLINE routing to your library by placing a **HOLD Request**. To place such a request, contact your Network Coordinator at the NER Regional office by entering the following URL:
<http://nrlm.gov/libinfo/DOCLINE/dochohd.html>. Also, see Module I-C. for details.

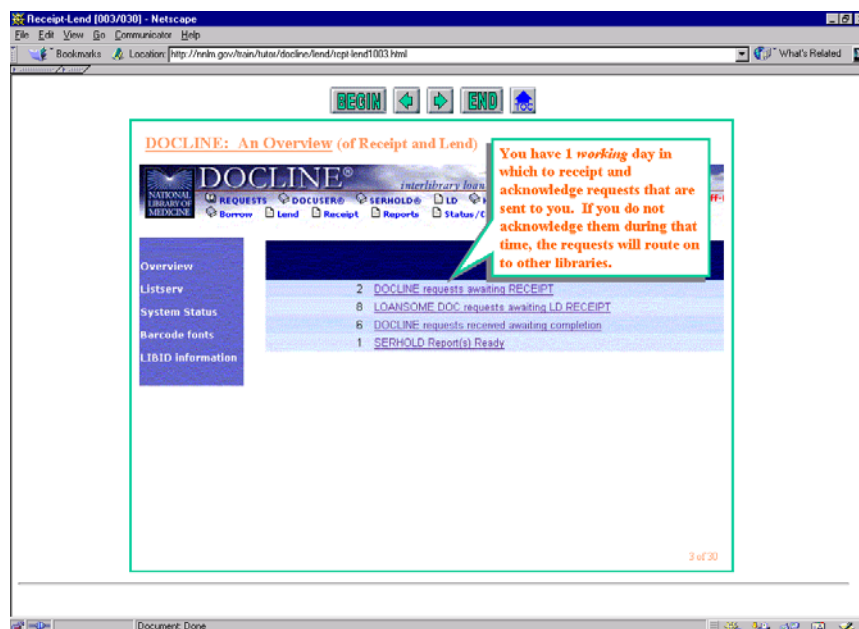
III. Receipt and Lend Requests

You can Receipt and Lend right from your Home Page, by logging in and clicking your message links.

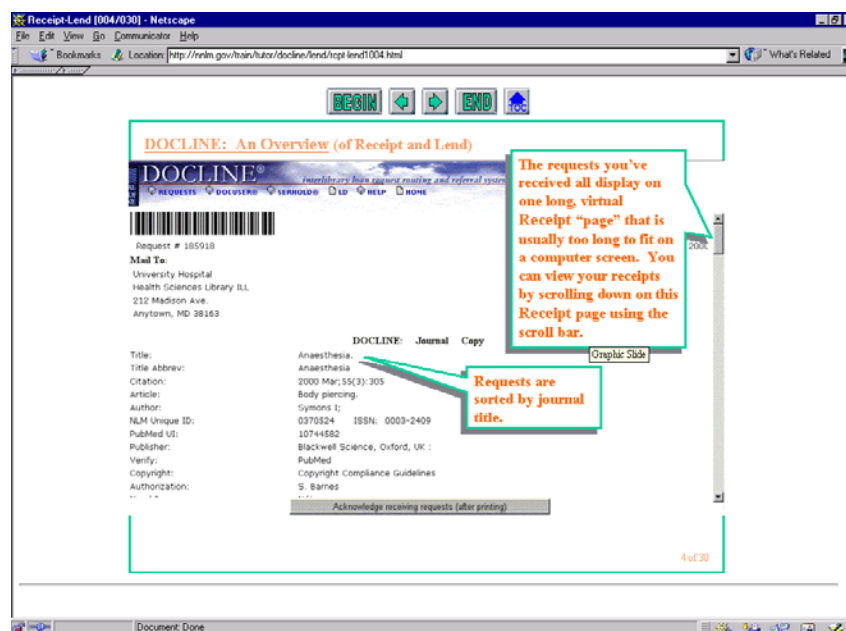


III. Receipt and Lend Requests

You have one working day in which to receipt and acknowledge requests that are sent to you. Requests that are not acknowledged during that time will route on to other lending libraries. The countdown begins at **12:05 A.M. ET** on the day following the request's entry.

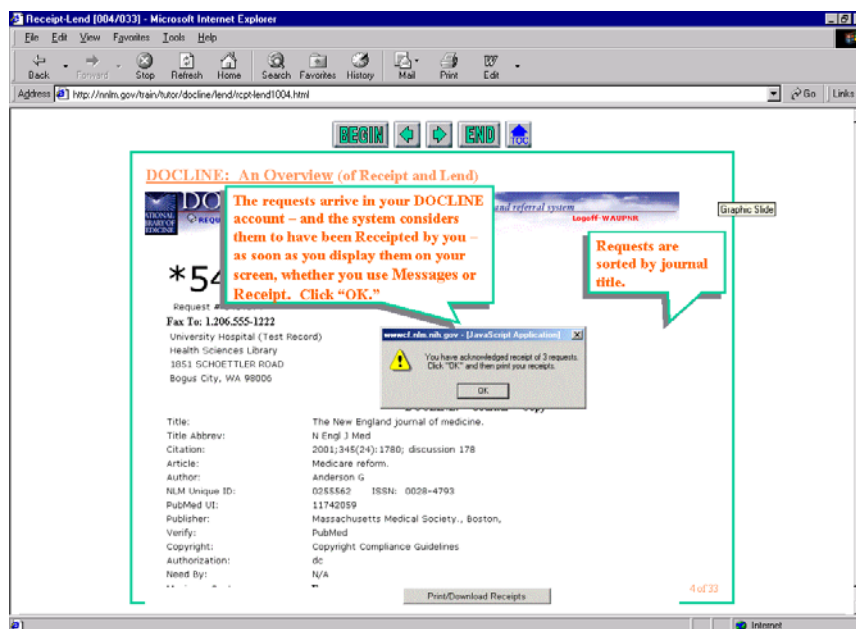


The requests you receive are all displayed on one long, virtual "receipt page" that is usually too long to fit on a standard computer screen. You can view your receipts by scrolling down the page with the scroll bar. Requests are sorted by journal title.

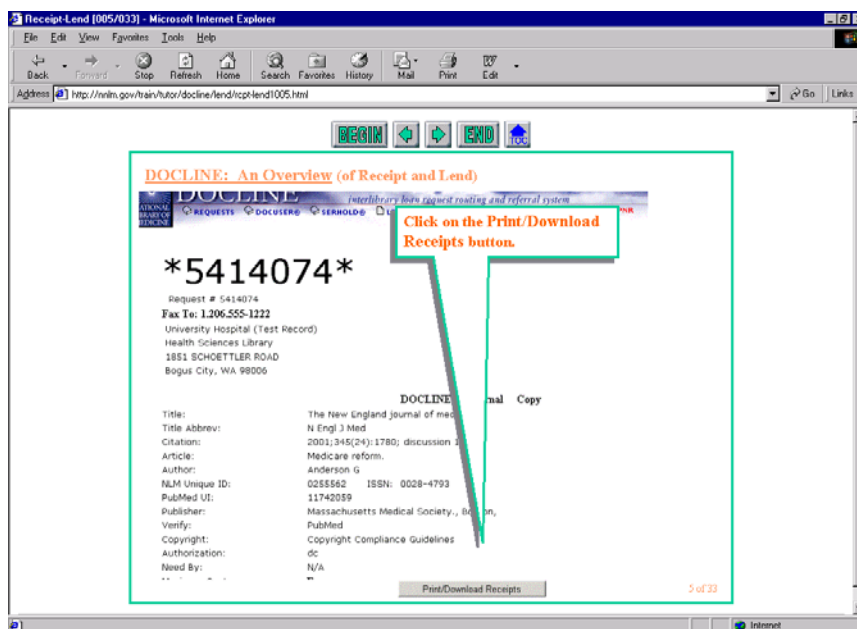


III. Receipt and Lend Requests

Use your browser's **Print** function to print requests. [Please note that the system considers a request receipted by you as soon as you display them on your screen, whether you use the Messages or Receipt option.] Click the **OK** button.

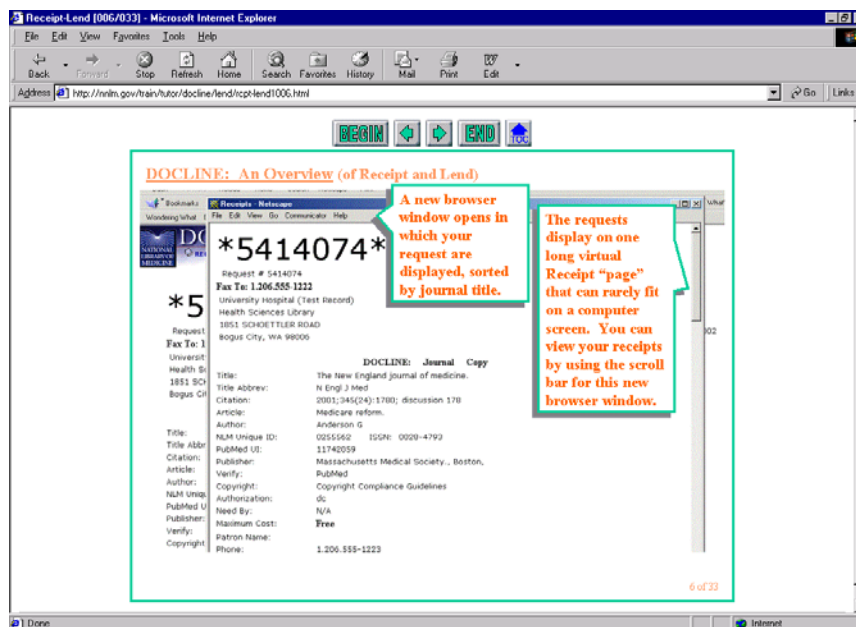


Click the **Print/Download Receipts** button.

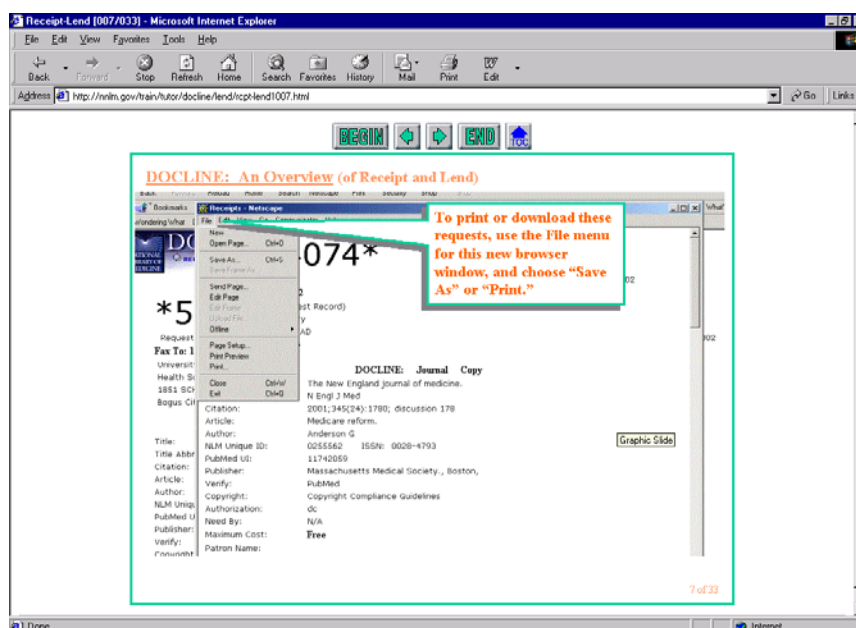


III. Receipt and Lend Requests

A new browser window opens to display your requests, sorted by journal title.

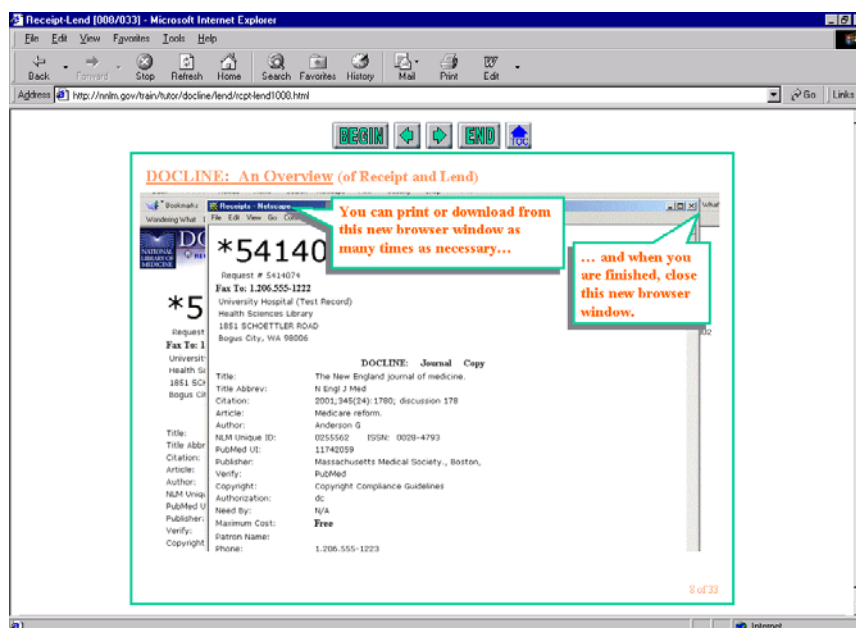


To print or download these requests (use the browser's pull-down menu) by selecting **File**, then **"Print"** (to secure a hard copy) or **"Save As"** (to download and secure a soft copy.)



III. Receipt and Lend Requests

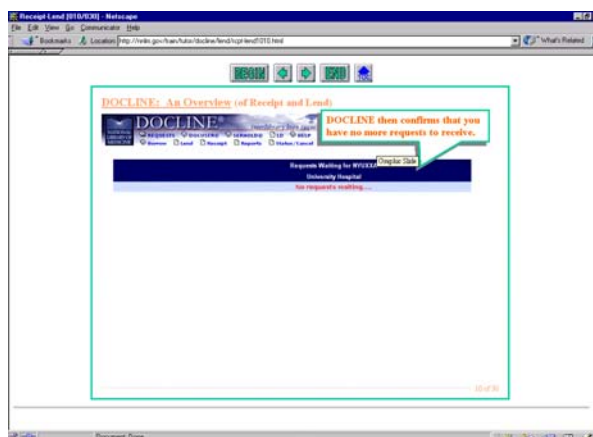
You can download or print from the browser window as many times as is necessary. When you are finished, close the window by clicking "X" in upper right corner.



KEY NOTE

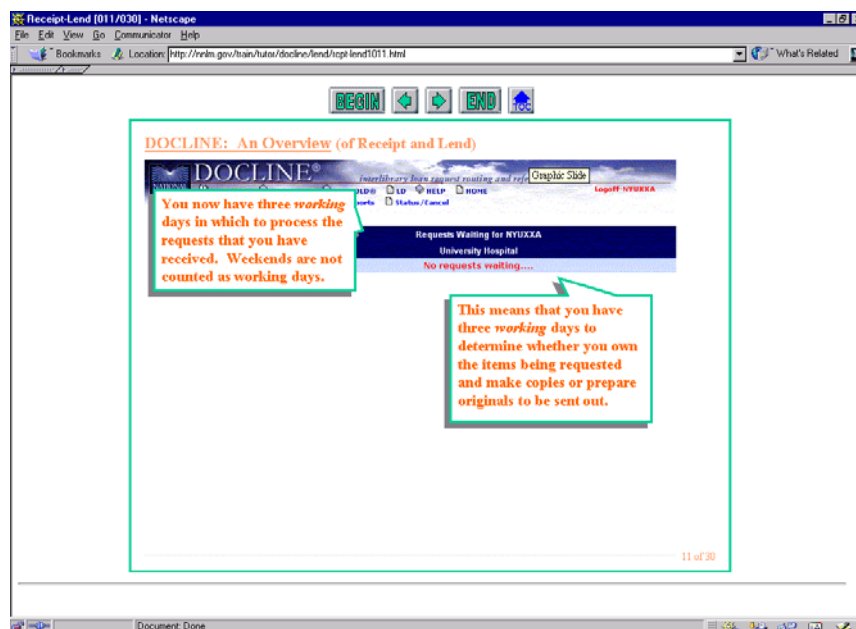
Make sure that your receipts are okay before leaving this page. Once you leave this page, you must go to DOCLINE's *Status/Cancel* feature to retrieve these requests once again.

DOCLINE confirms (*see red lettering, below*) that you have no more lend requests to retrieve.



III. Receipt and Lend Requests

You now have **three working days** to process the requests that you received. Time is counted beginning **12:05 A.M. ET** the day following their receipt. Weekend days are NOT counted as working days.



You must update the system in time, or requests will route to other libraries.

Should other libraries fill requests that you have already filled (due to an oversight on your part to update them in DOCLINE), please do not expect a reimbursement for filling the request.

DOCLINE will provide a message on your Home Page confirming how many requests have been receipted and awaiting completion. DOCLINE will also give you this warning the day before any requests are routed to other libraries. To view requests, click the appropriate link.

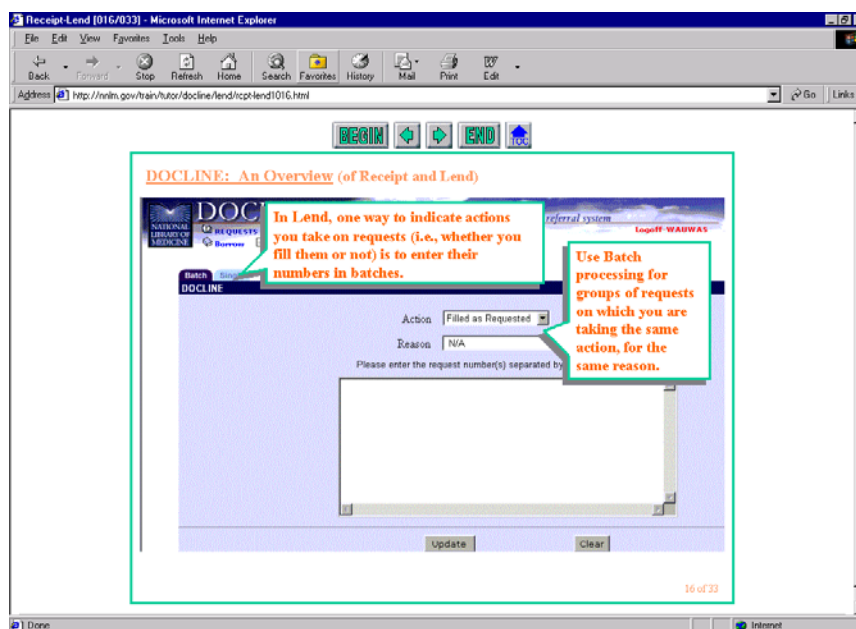


III. Receipt and Lend Requests

To update DOCLINE to fill or reject requests, click on the link: "DOCLINE requests received awaiting completion." Or, click **REQUESTS**, then **Lend**.

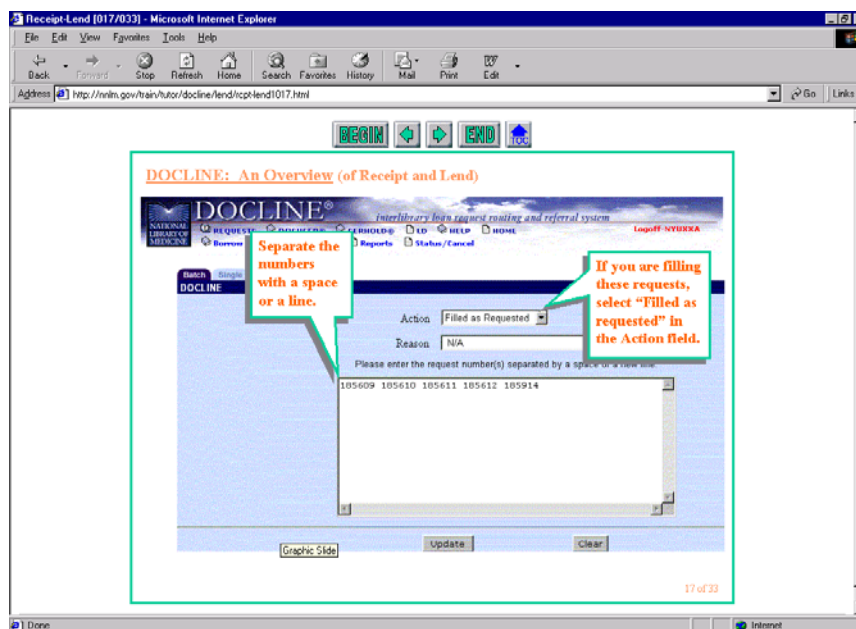


With the Lend feature, one way to indicate actions you take on requests is to enter request numbers in batches. Use the *Batch Processing* screen for groups of requests on which you are taking the same **Action** and **Reason**.

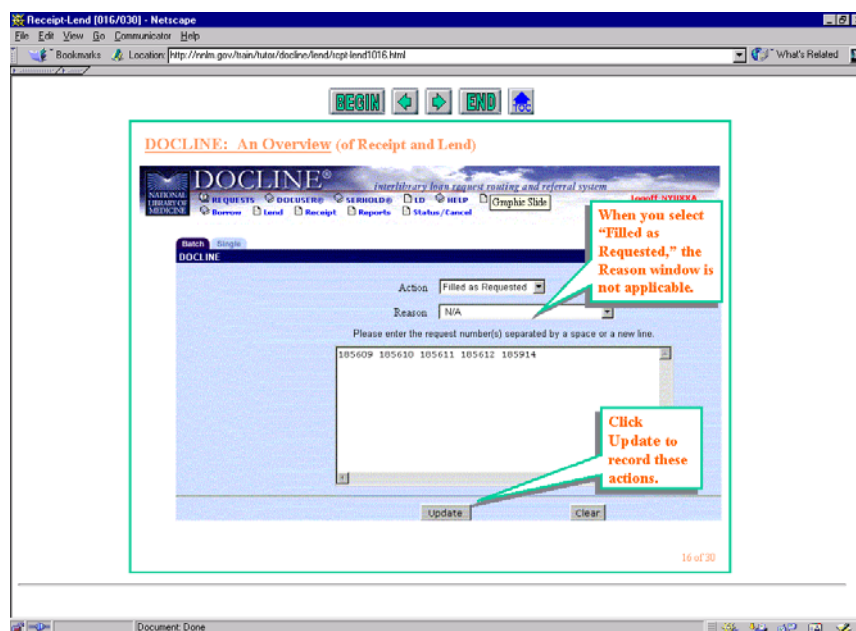


III. Receipt and Lend Requests

Separate the request numbers with a space or a line. If you are filling these requests, select "*Filled as requested*" in the **Action** field. When you select "*Filled as Requested*," the **Reason** field is not applicable.

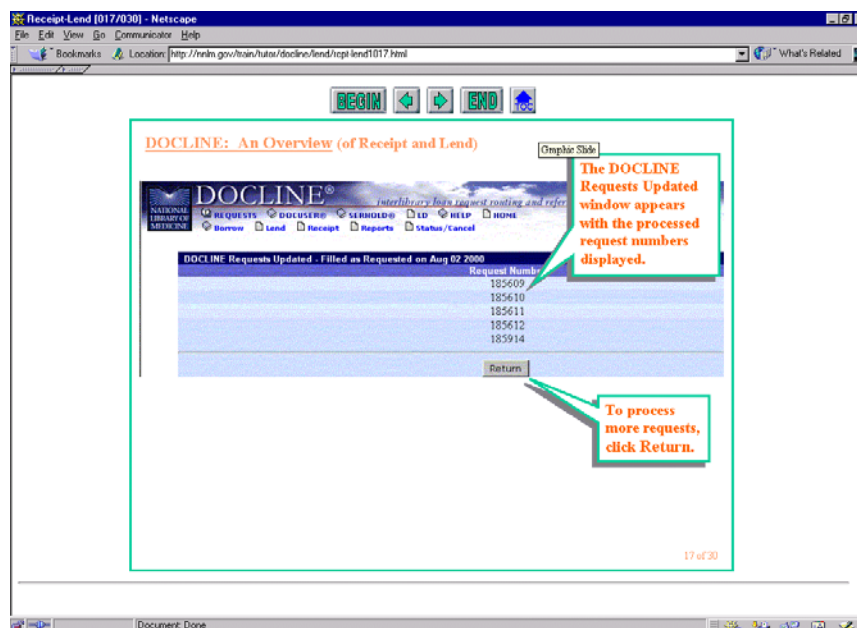


Click the **Update** button to record these actions.

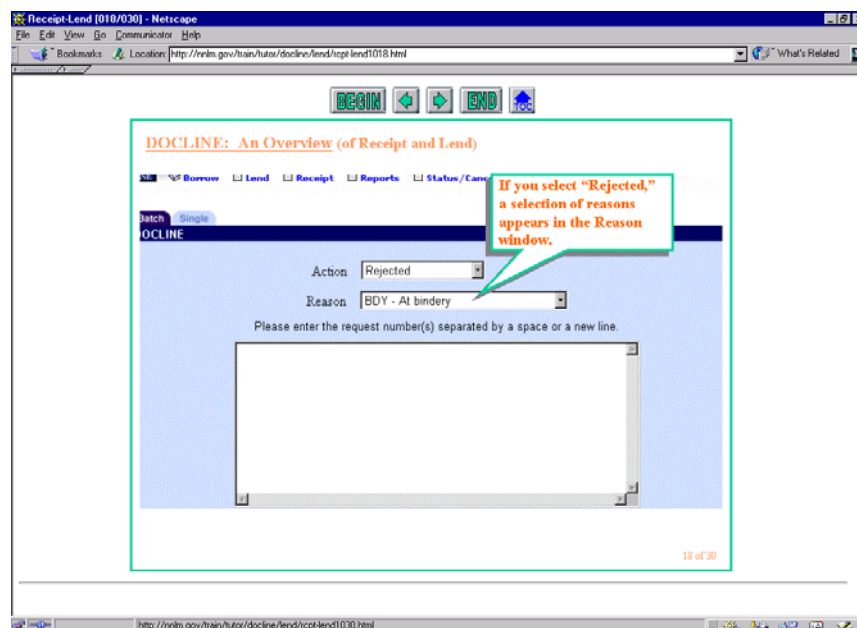


III. Receipt and Lend Requests

The DOCLINE *Requests Updated* window appears with the processed request numbers displayed. To process more requests, click the **Return** button.

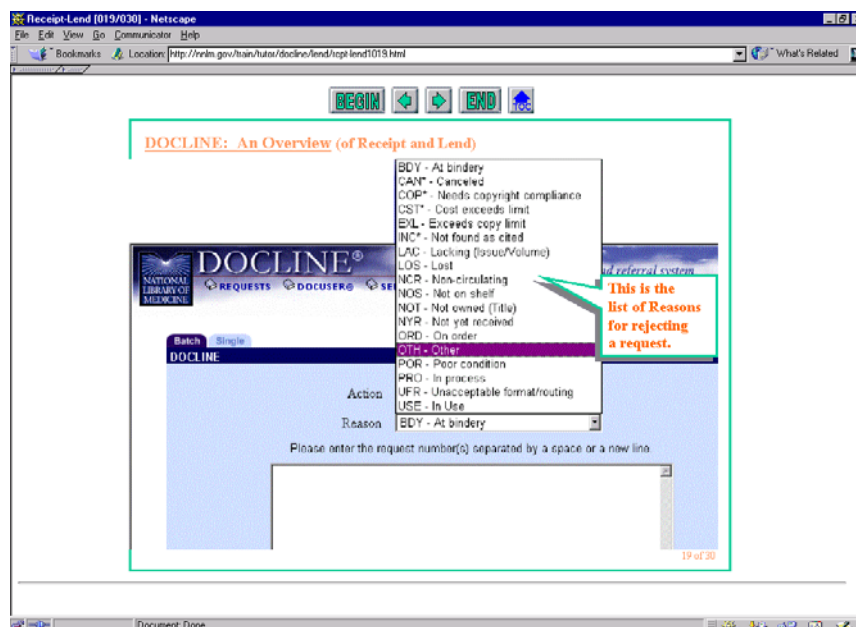


If you select "Rejected," a selection of reasons appears in the **Reason** window.

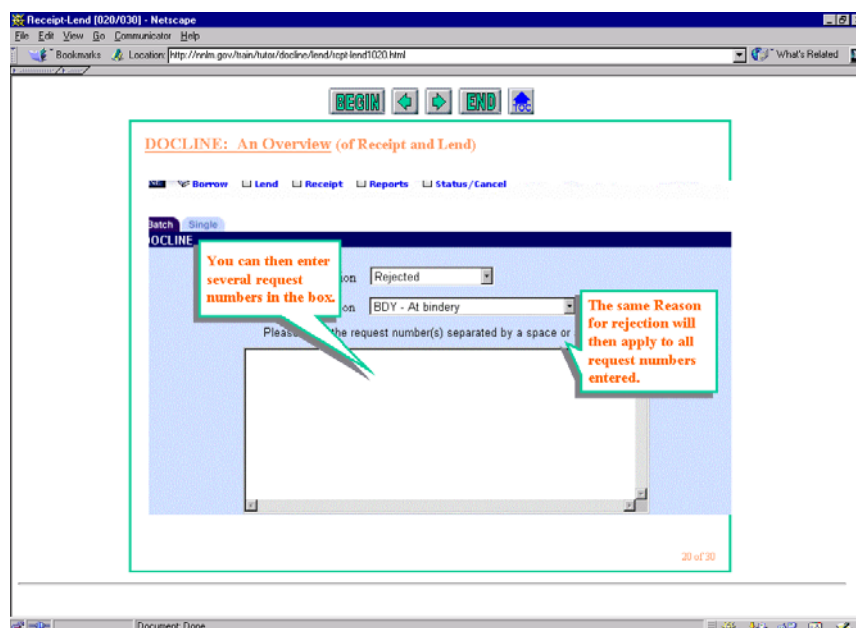


III. Receipt and Lend Requests

There is a list of Reasons for rejecting a request (*see below*).

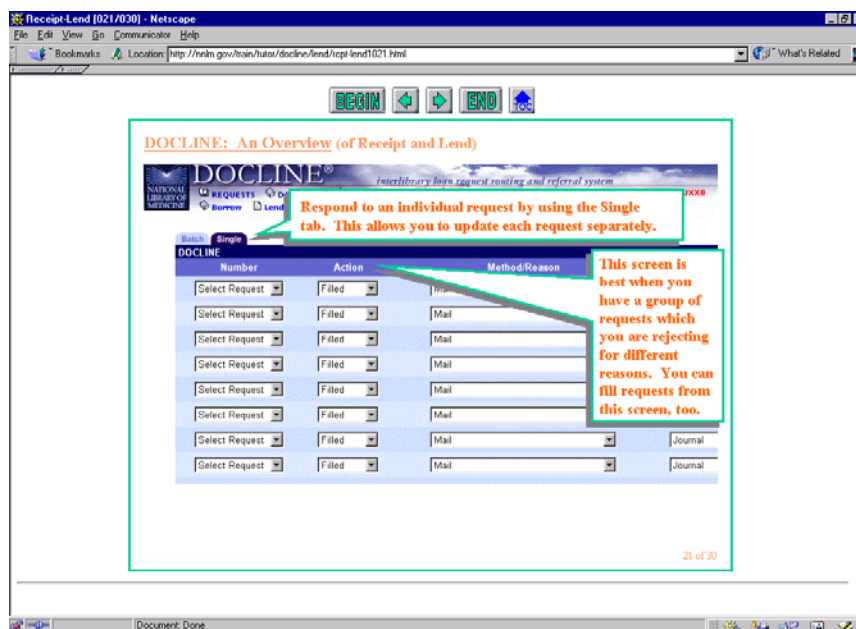


You can enter several request numbers in the box. The same Reason for rejection will then apply to all of the request numbers entered.

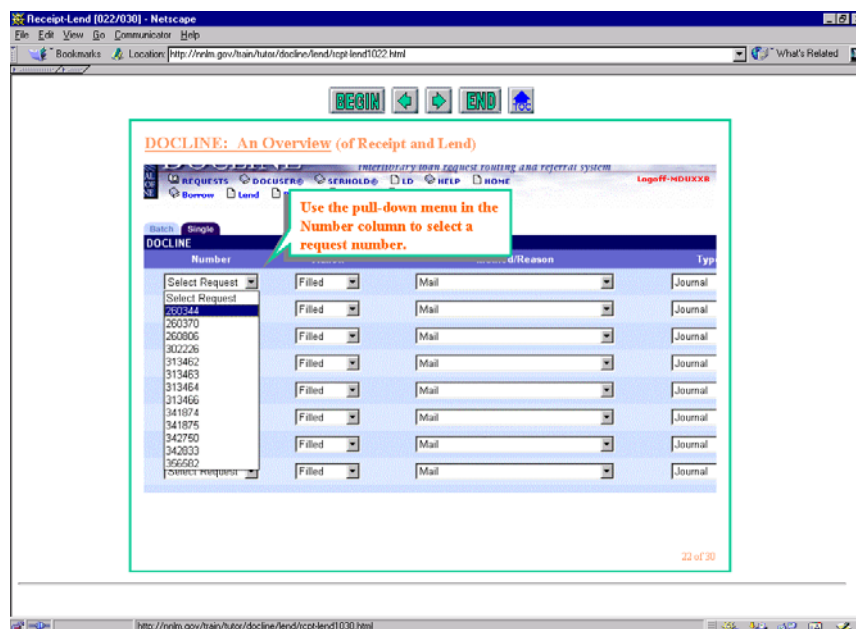


III. Receipt and Lend Requests

Respond to individual requests by using the *Single* tab. This allows you to update each request separately. Use this screen when you have a group of requests that you are rejecting for different reasons. You can fill requests from this screen, too.

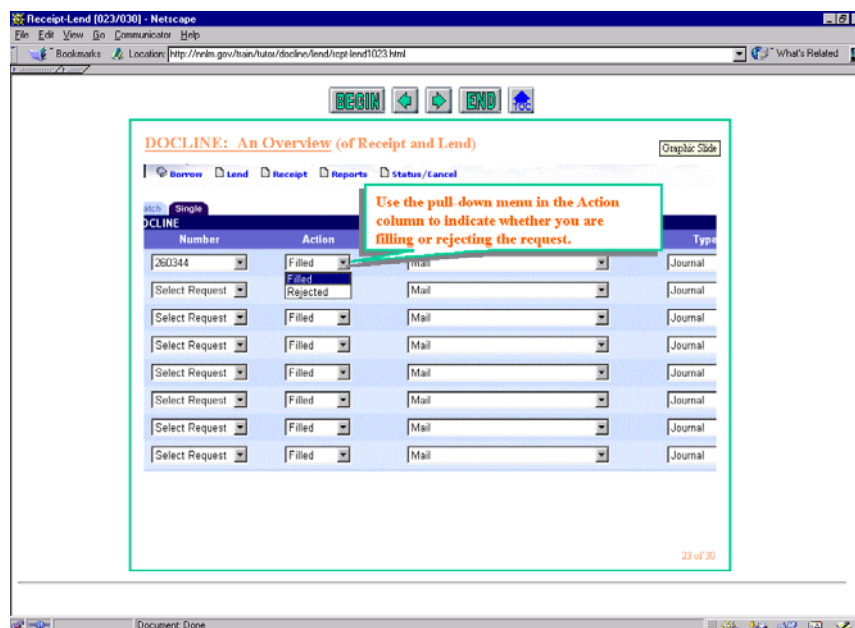


Use the drop down box in the **Number** column to select a specific request number.

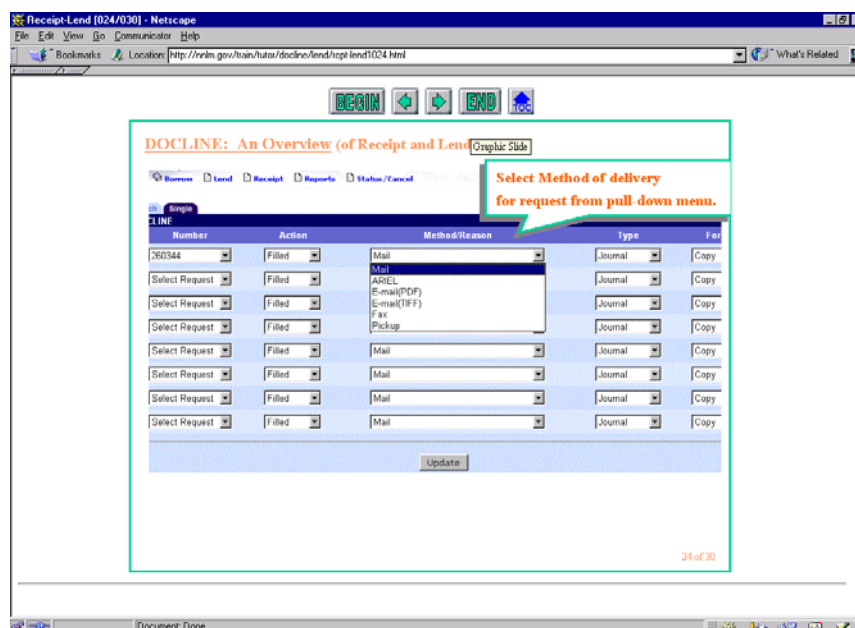


III. Receipt and Lend Requests

Use the drop down box in the **Action** column to indicate whether you are filling or rejecting the request.



Select **Method of Delivery** from the drop-down box.



III. Receipt and Lend Requests

Select **Type**: Journal or Monograph.

The screenshot shows the 'Receipt-Lend' interface in a Netscape browser window. A red callout box points to the 'Type' dropdown menu, which is currently set to 'Journal'. The interface includes a navigation bar with links for 'Lend', 'Receipt', 'Reports', and 'Status/Cancel'. Below the navigation bar is a table with columns: 'Number', 'Action', 'Method/Reason', 'Type', and 'Form'. The table contains several rows of data, each representing a request. The 'Type' column for all requests is set to 'Journal'. The 'Form' column is set to 'Copy'.

Number	Action	Method/Reason	Type	Form
Request	Filled	Mail	Journal	Copy
Request	Filled	Mail	Journal	Copy
Request	Filled	Mail	Journal	Copy
Request	Filled	Mail	Journal	Copy
Request	Filled	Mail	Journal	Copy
Request	Filled	Mail	Journal	Copy
Request	Filled	Mail	Journal	Copy

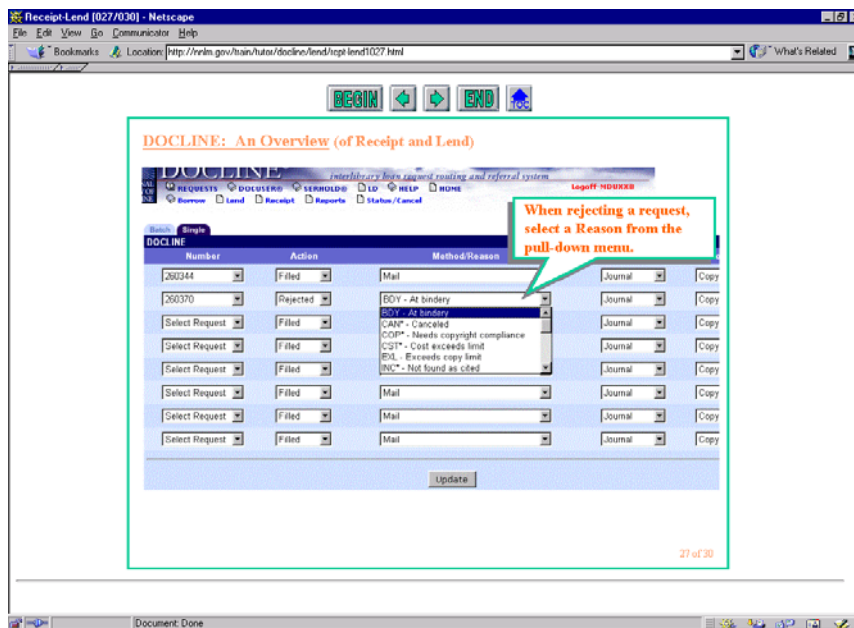
Select **Form** to indicate whether copy or original was sent.

The screenshot shows the 'Receipt-Lend' interface in a Netscape browser window. A red callout box points to the 'Form' dropdown menu, which is currently set to 'Copy'. The interface includes a navigation bar with links for 'Lend', 'Receipt', 'Reports', and 'Status/Cancel'. Below the navigation bar is a table with columns: 'Number', 'Action', 'Method/Reason', 'Type', and 'Form'. The table contains several rows of data, each representing a request. The 'Form' column for all requests is set to 'Copy'. The 'Type' column is set to 'Journal'.

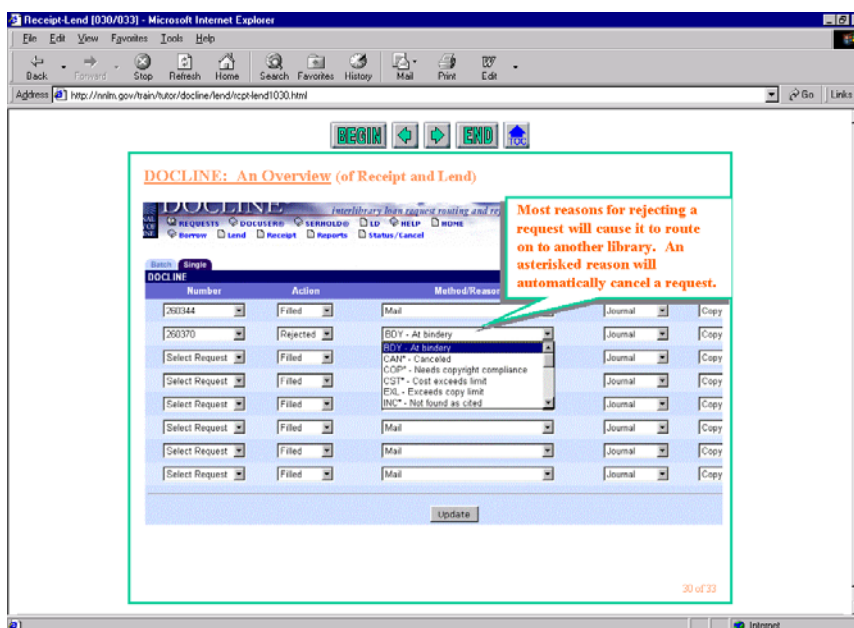
Number	Action	Method/Reason	Type	Form
Request	Filled	Mail	Journal	Copy
Request	Filled	Mail	Journal	Copy
Request	Filled	Mail	Journal	Copy
Request	Filled	Mail	Journal	Copy
Request	Filled	Mail	Journal	Copy
Request	Filled	Mail	Journal	Copy
Request	Filled	Mail	Journal	Copy
Request	Filled	Mail	Journal	Copy

III. Receipt and Lend Requests

When rejecting a request, select a **Reason** from the drop-down box.

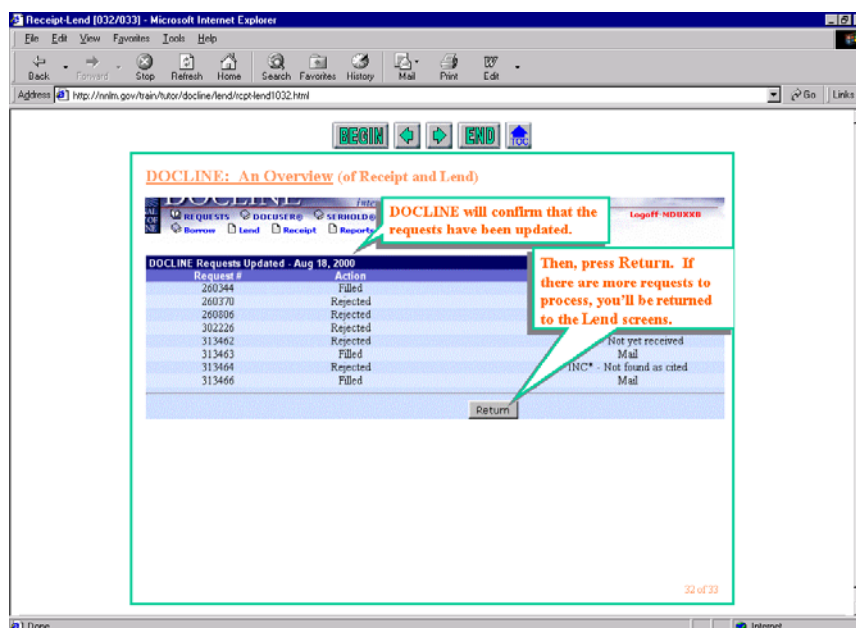


Most reasons for rejecting a request will cause it to route to another library. An asterisk (*) reason will automatically cancel a request.



III. Receipt and Lend Requests

DOCLINE will confirm that the requests have been updated. Then, click the **Return** button. If there are more requests to be processed, you will be returned to the Lend screens.



III. The Status / Cancel Feature

The Status/Cancel feature provides the ability:

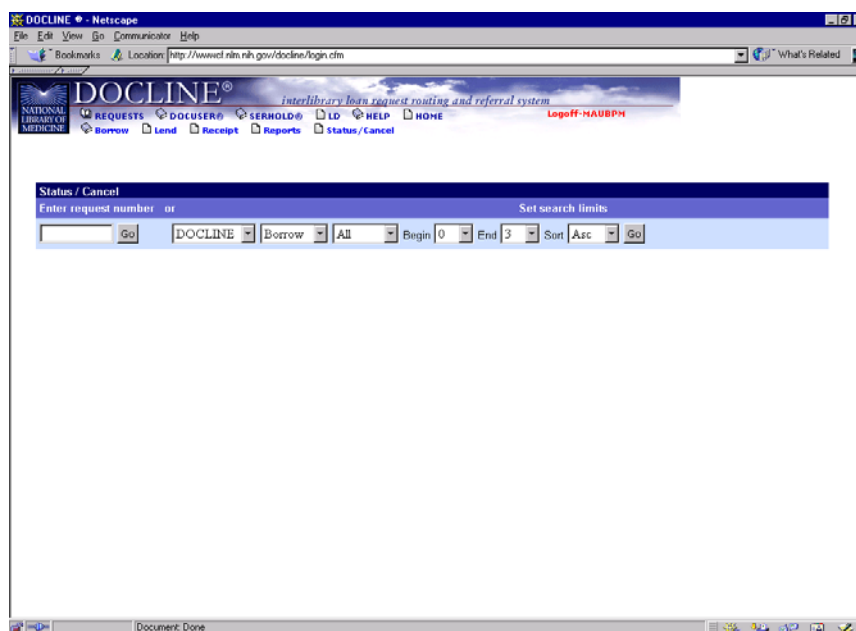
- to gain information about the status of borrow requests
- to view request history
- to review lending requests received, but not completed processing or updating
- to cancel requests

To initiate the Status/Cancel feature:

Step 1. Log into DOCLINE (*see Module I for instructions*).

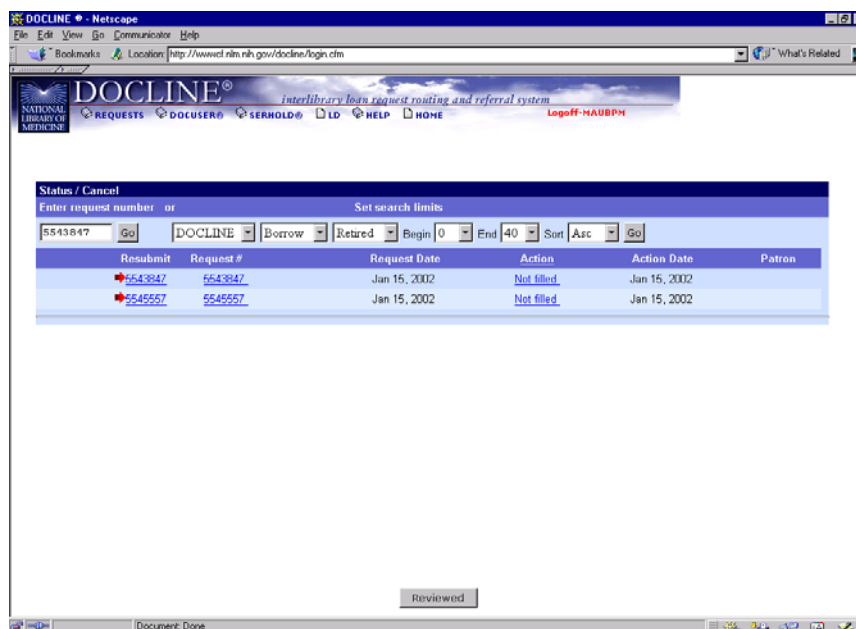
Step 2. Click **REQUESTS**.

Step 3. Click **Status/Cancel**.

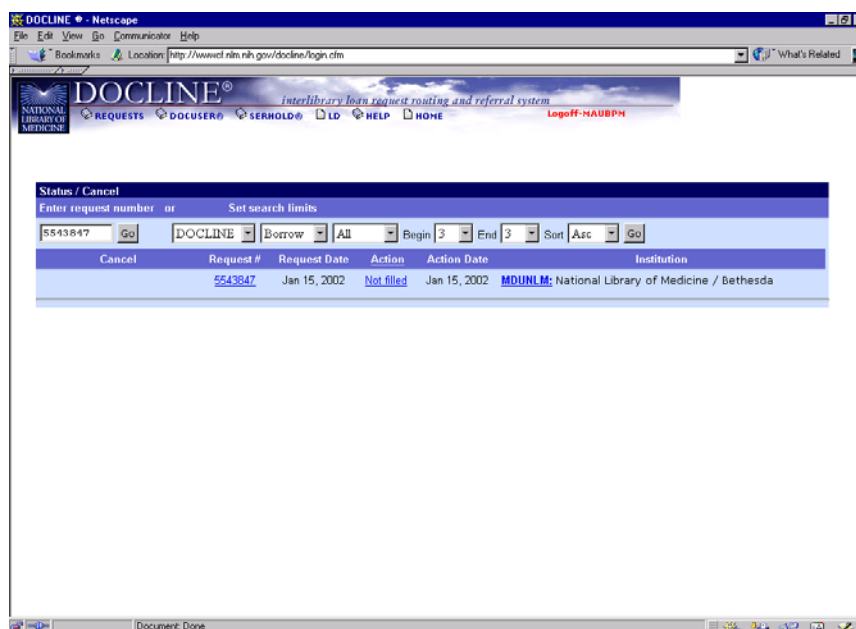


III. The Status / Cancel Feature

The Status/Cancel feature allows you to obtain information about a specific request by entering the Request Number, then click the **Go** button. (To obtain information about a group of requests, set the search limits.)

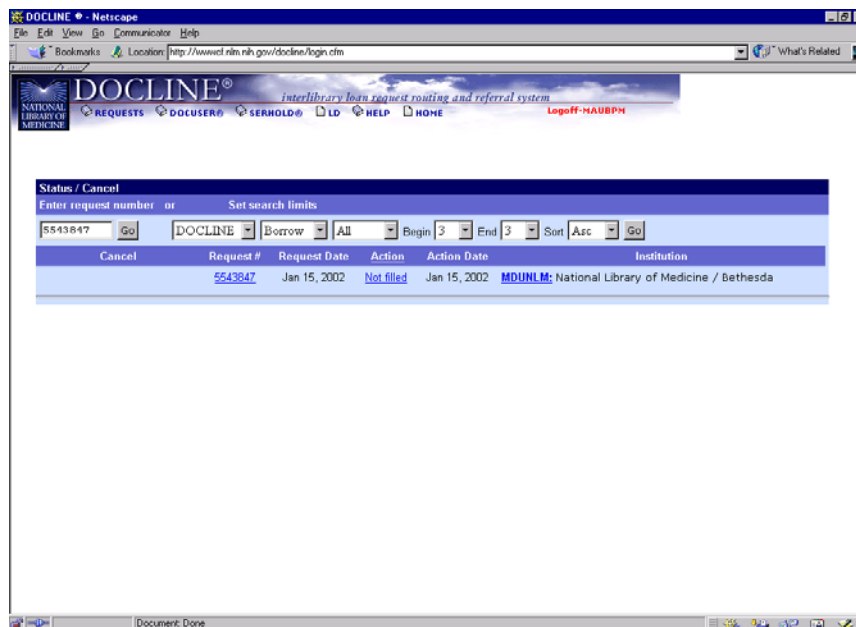


(See that the Action was "Not Filled" by NLM because the request was sent as a demo.)

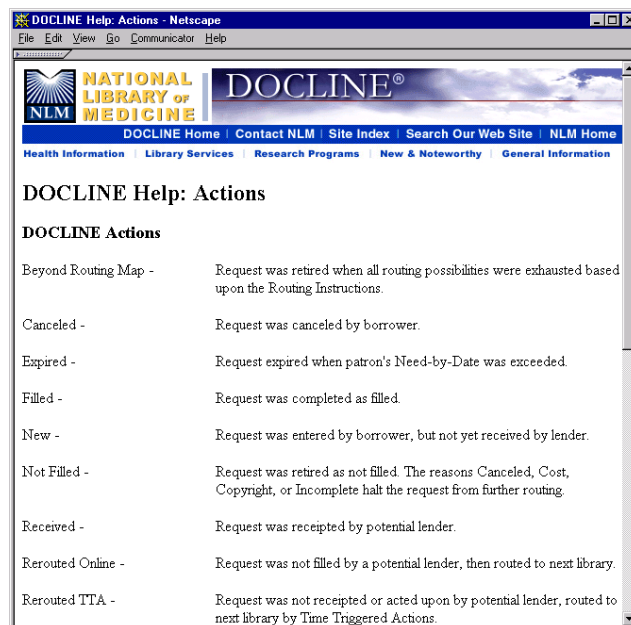


III. The Status / Cancel Feature

For a list of Action values and their definitions, click the [Action](#) link.

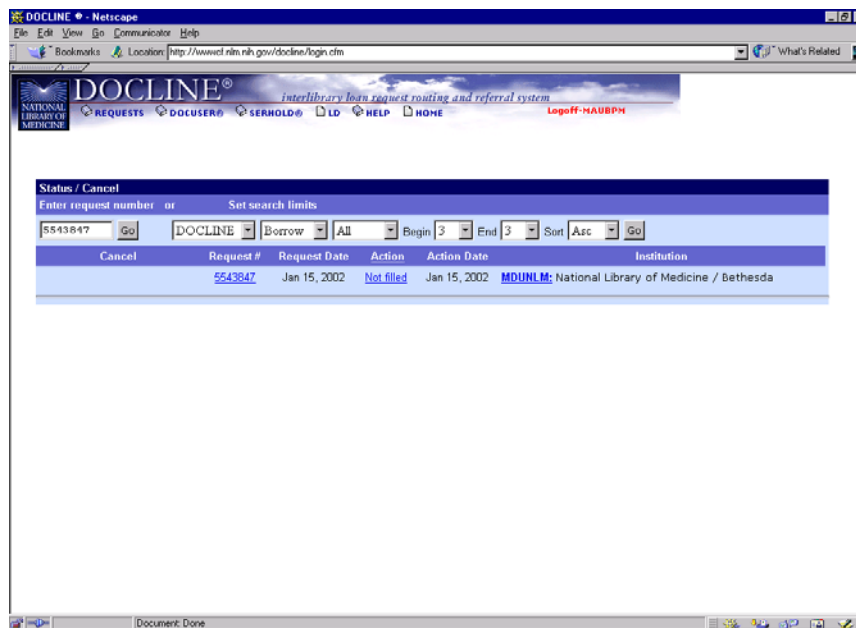


A separate browser window pops up, listing Action values and their definitions.

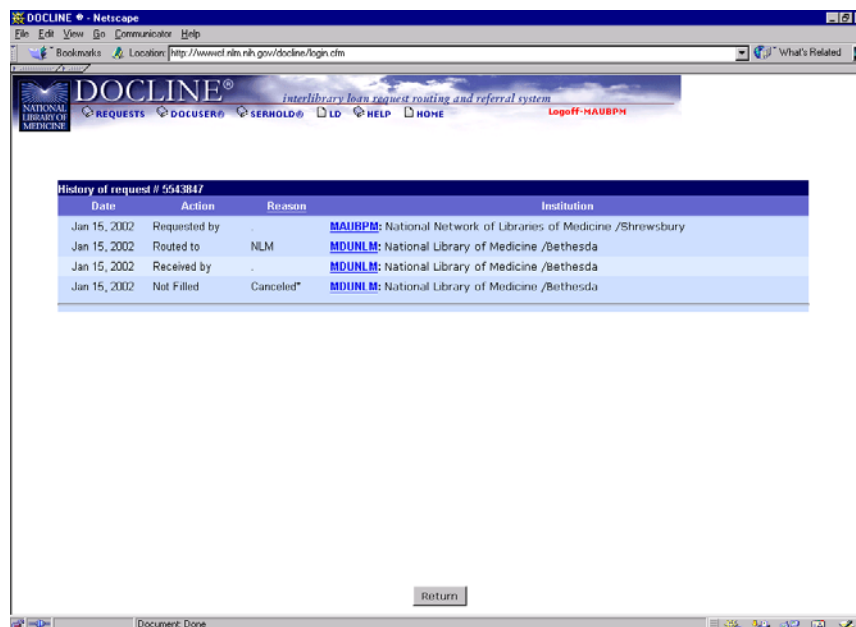


III. The Status / Cancel Feature

For an entire history for this request, click the Action value link for a *specific* request.

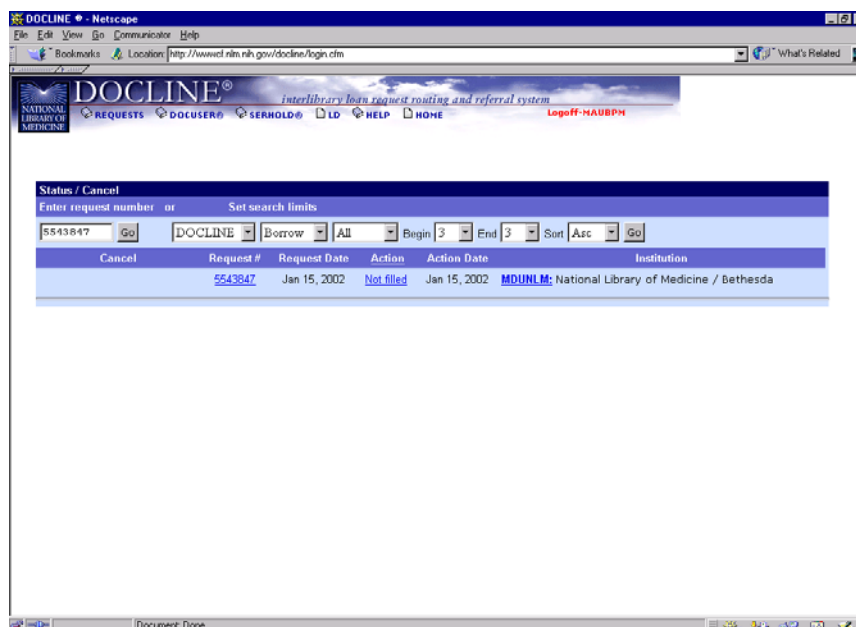


You can view the entire history for this request.

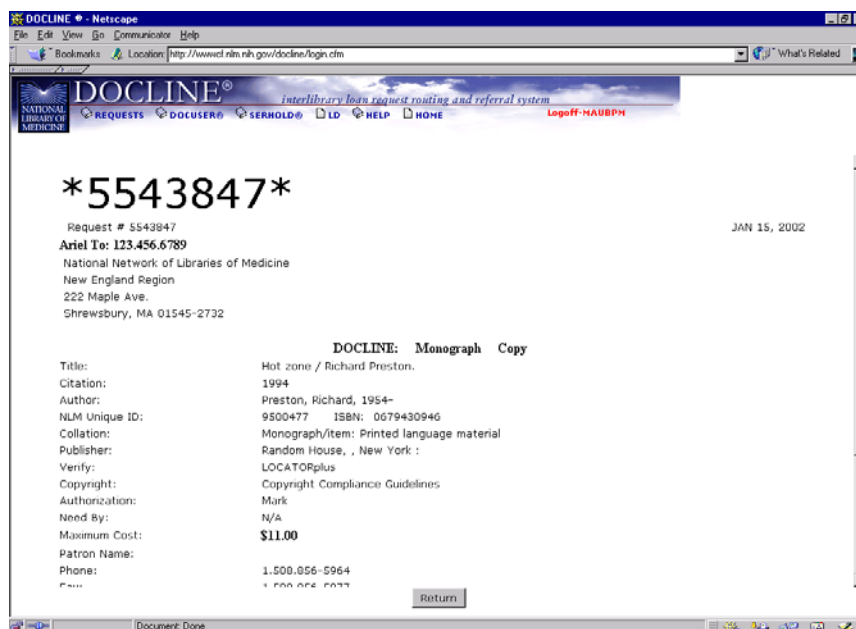


III. The Status / Cancel Feature

For a copy of the request, click the [link](#) for a specific Request Number.

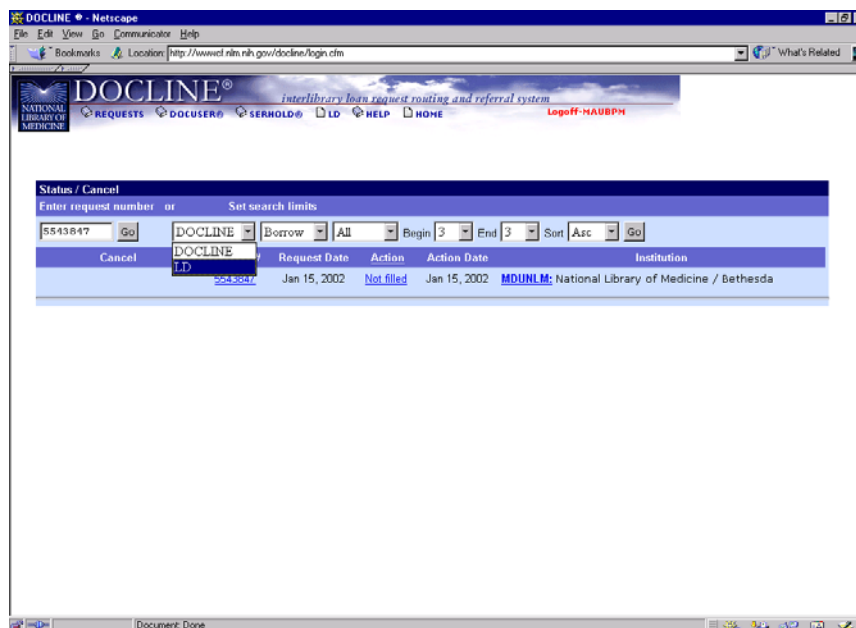


The request information displays on your screen. Use the side scroll bar to view everything. Use your browser pull-down menu and choose the **Print** function to obtain a hard copy of the information displayed.

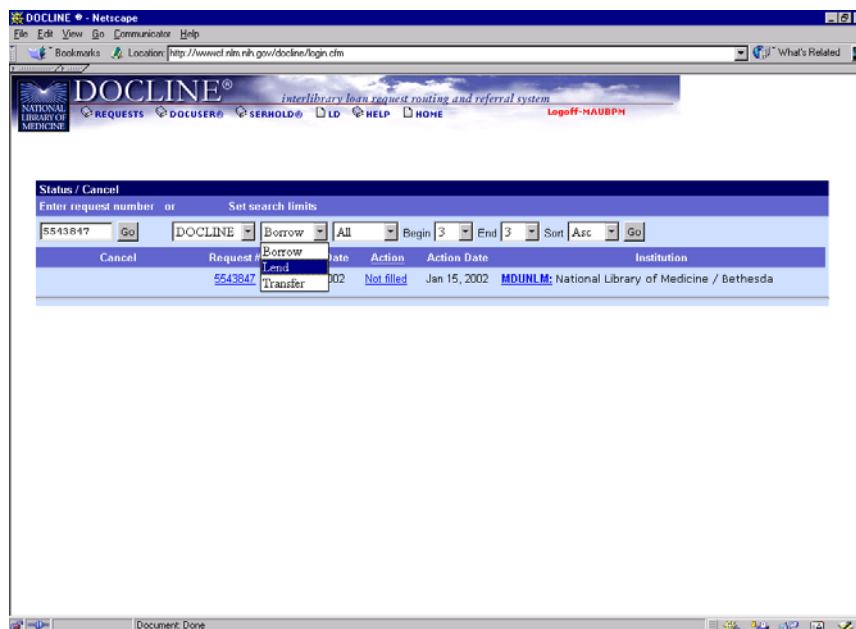


III. The Status / Cancel Feature

View the status of a group of requests with the *Set Search Limits* option. Begin by selecting DOCLINE or LD (Loansome Doc) requests.

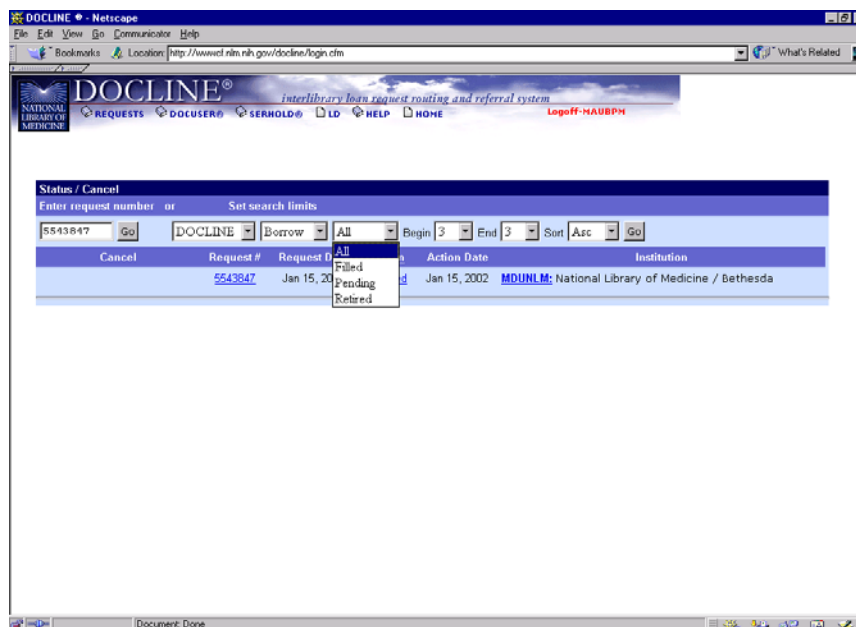


Then select *Request Type* (Borrow - Lend - Transfer): for example, select "Borrow" to display requests that you have sent out to other libraries.

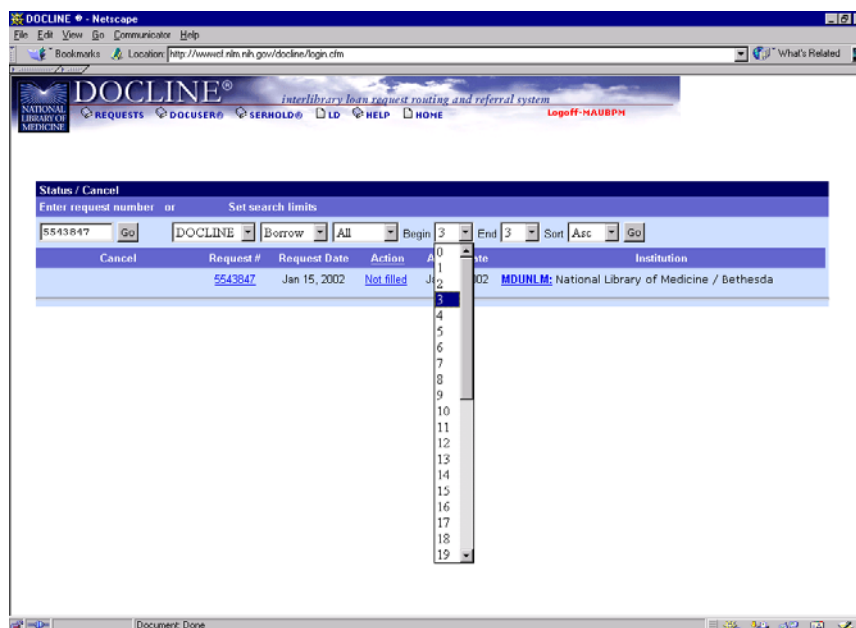


III. The Status / Cancel Feature

Select the *Status of Requests* (All - Filled - Pending - Retired):

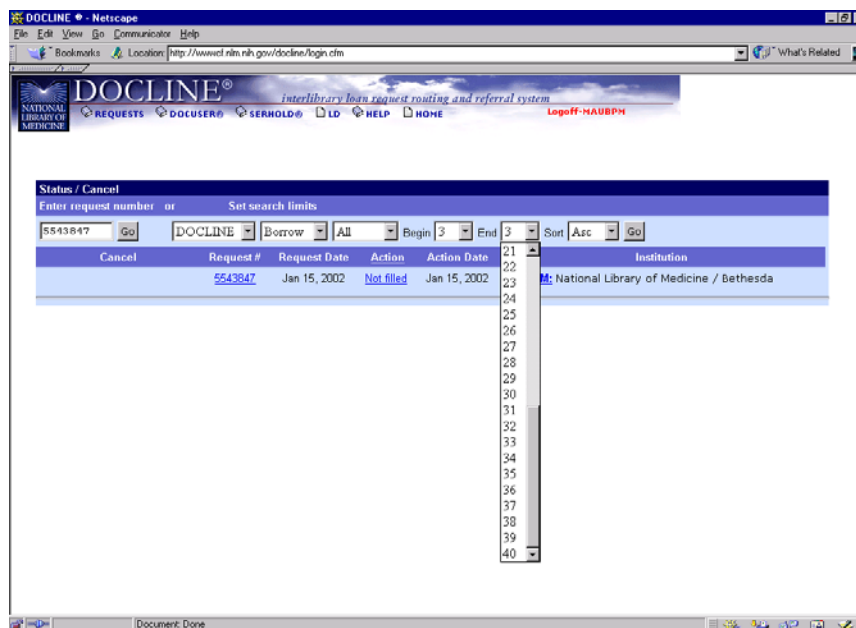


Then, select the *Number of "Begin" Days* (i.e., the number of days since the request was first initiated or received.)

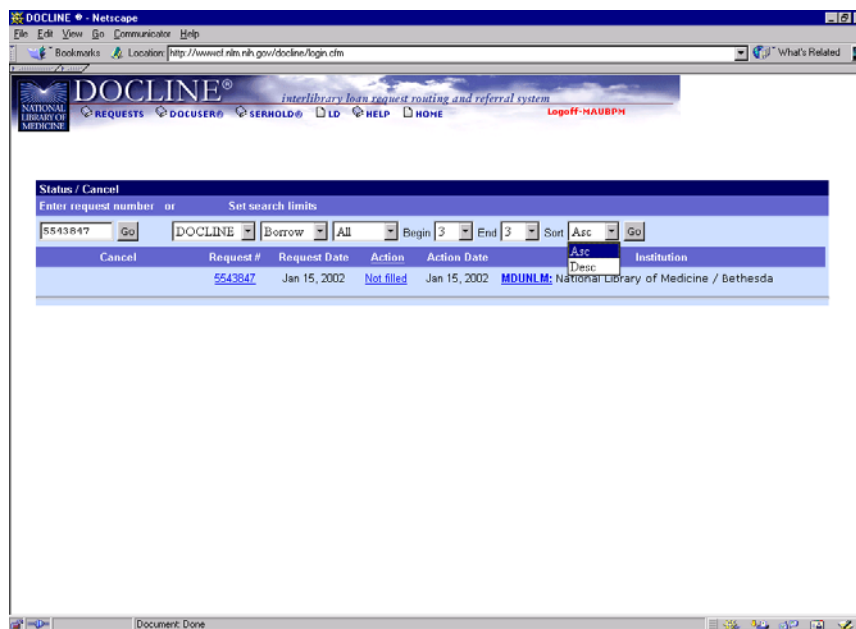


III. The Status / Cancel Feature

Select the *Number of "End" Days* (i.e., the number of days since the last action was taken on the request.)

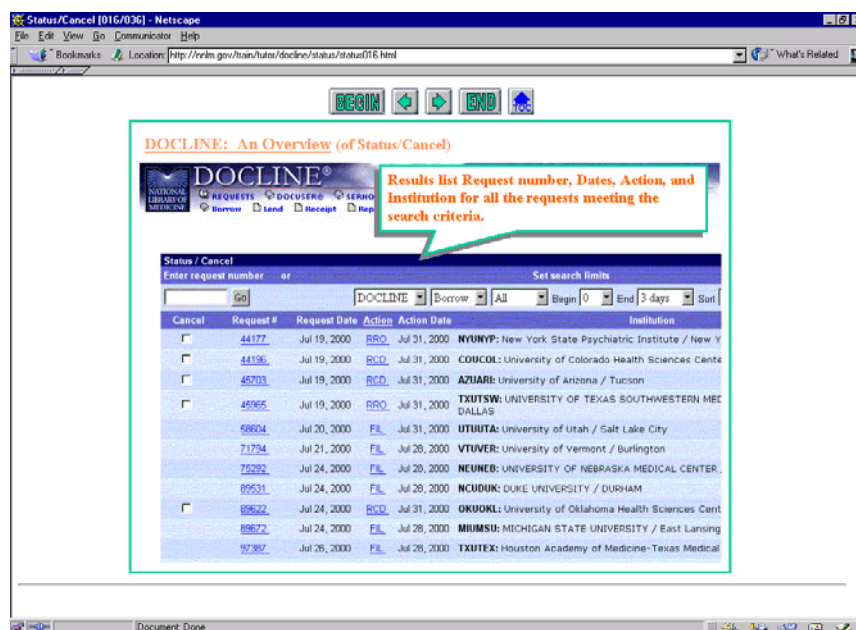


Then, select the *Sort Order* (Ascending - Descending) and click the **Go** button. The default sort order is "Ascending".

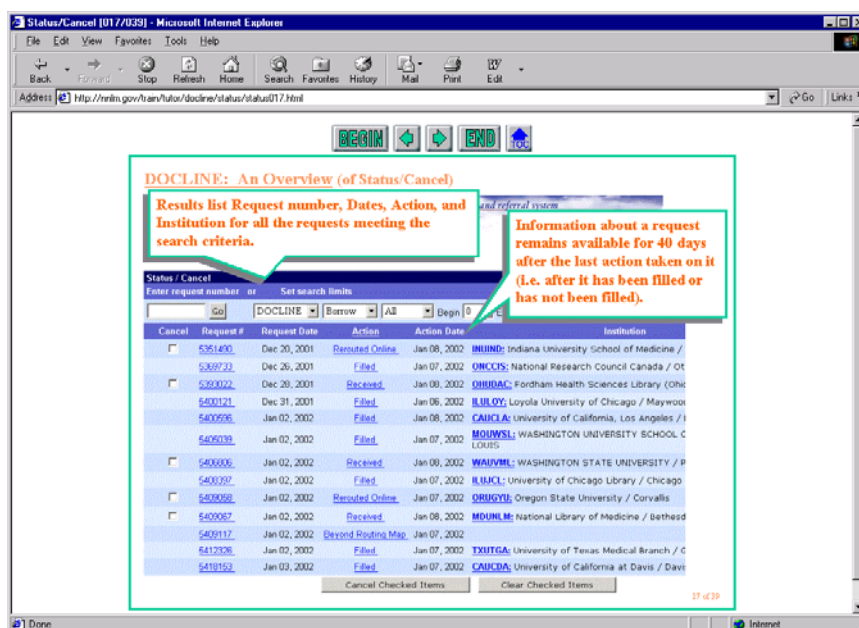


III. The Status / Cancel Feature

The Results screen will list Request Number, Dates, Action and Institution for all the requests meeting the search criteria.

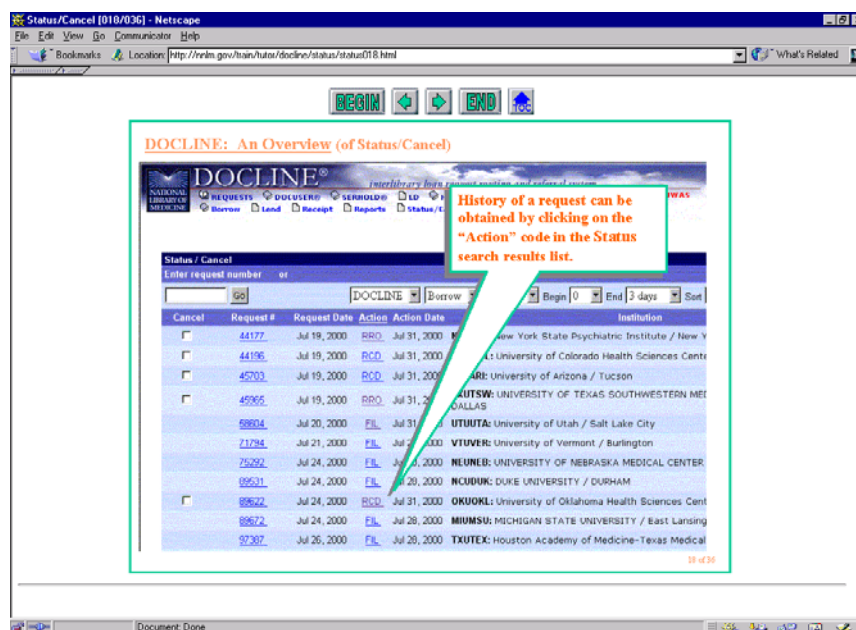


Information about the request remains available for **40 days** after the last action is taken.

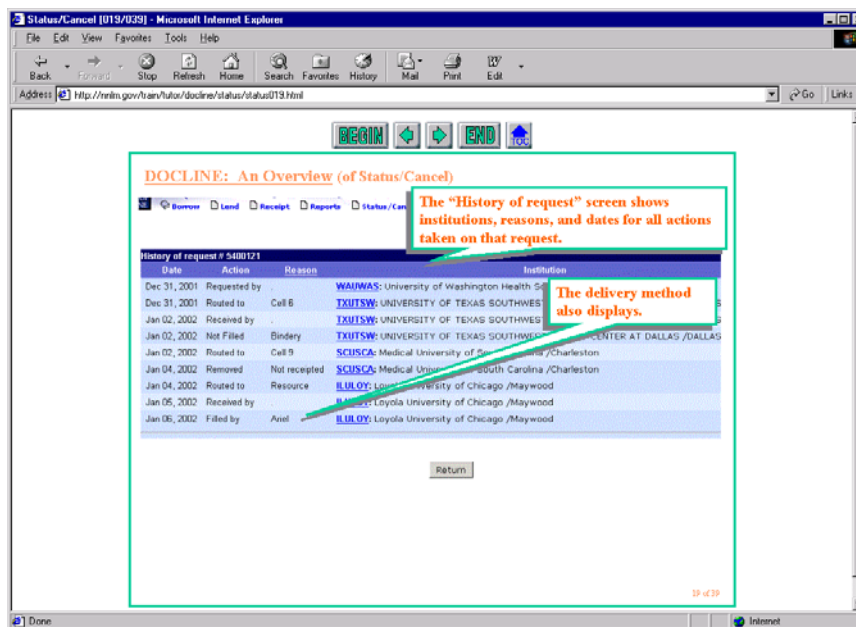


III. The Status / Cancel Feature

History of a request can be obtained by clicking the Action Value link in the Status search results list.

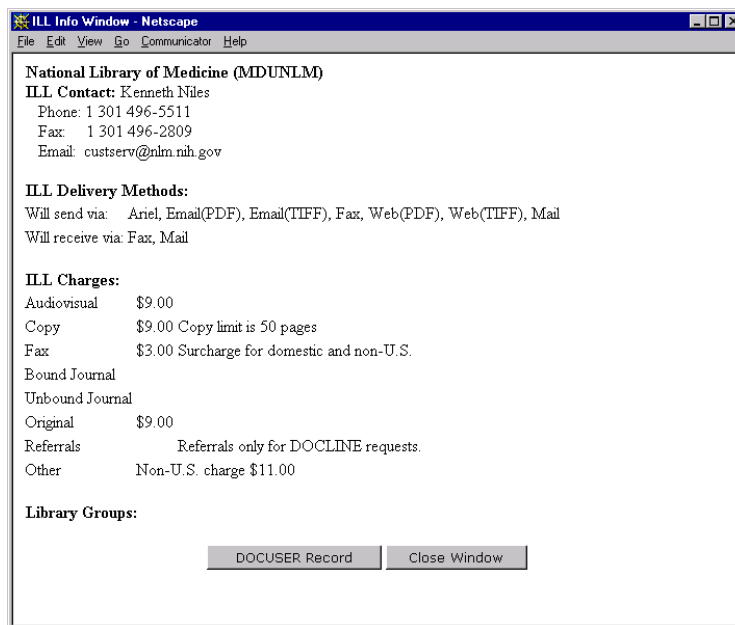
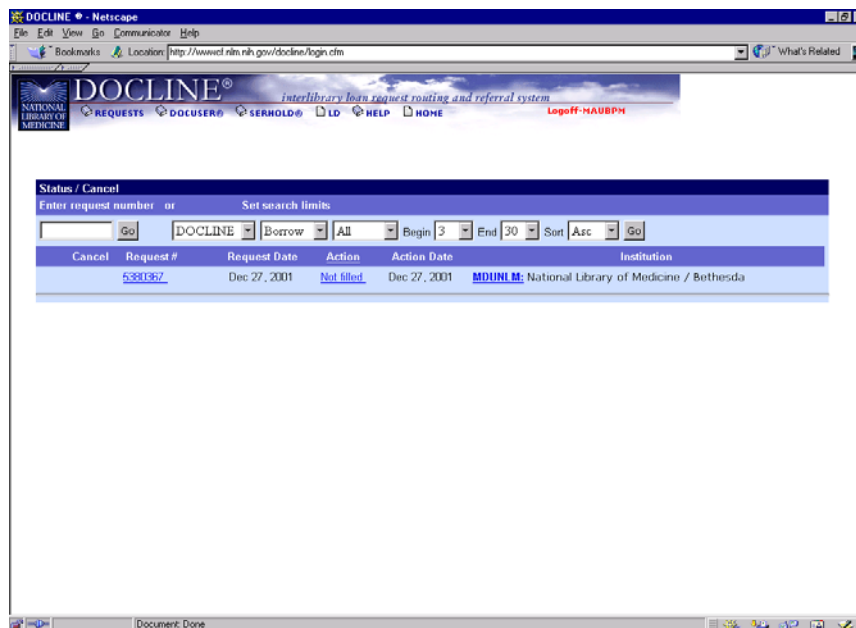


The "History of request" screen shows institutions, reasons and dates for all actions taken on that request. The Delivery Feature also displays.



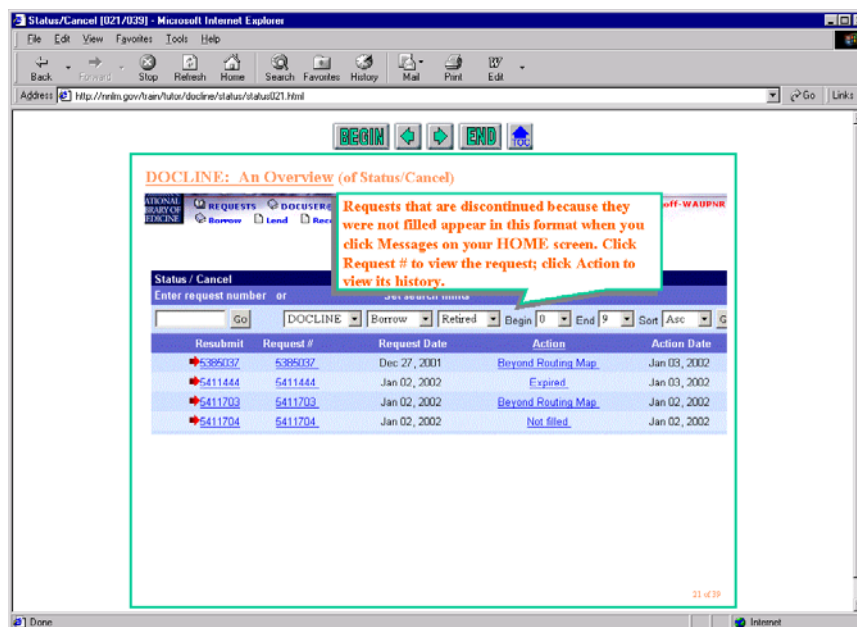
III. The Status / Cancel Feature

Click on the LIBID for information about any of the libraries to which the request was routed.



III. The Status / Cancel Feature

Requests that are discontinued because they were not filled appear when you click Message links on your HOME Page. Click the Request Number link to view the request; click the Action Value link to view its history.

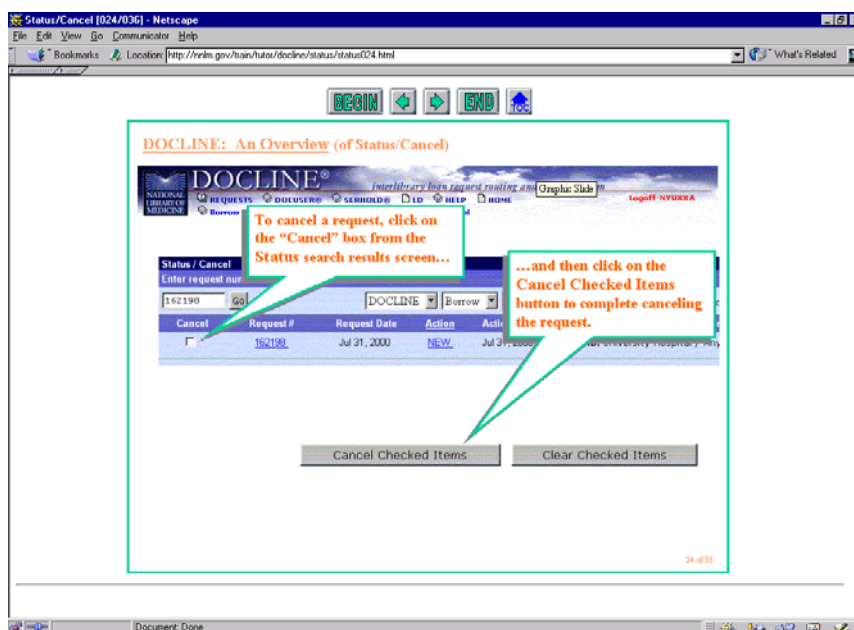


To resubmit a request, click the Resubmit Number link for that request.

(See III-F of this module for more information about resubmitting unfilled requests.)

III. The Status / Cancel Feature

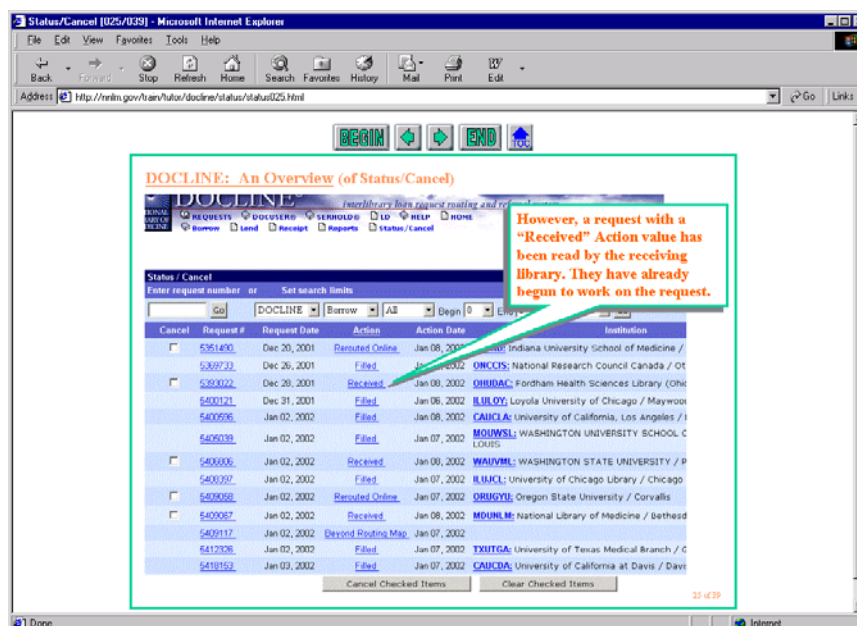
To cancel a request, click the Resubmit Number link for that request. Then, check off the *Cancel Checked Items* box to complete the cancellation.



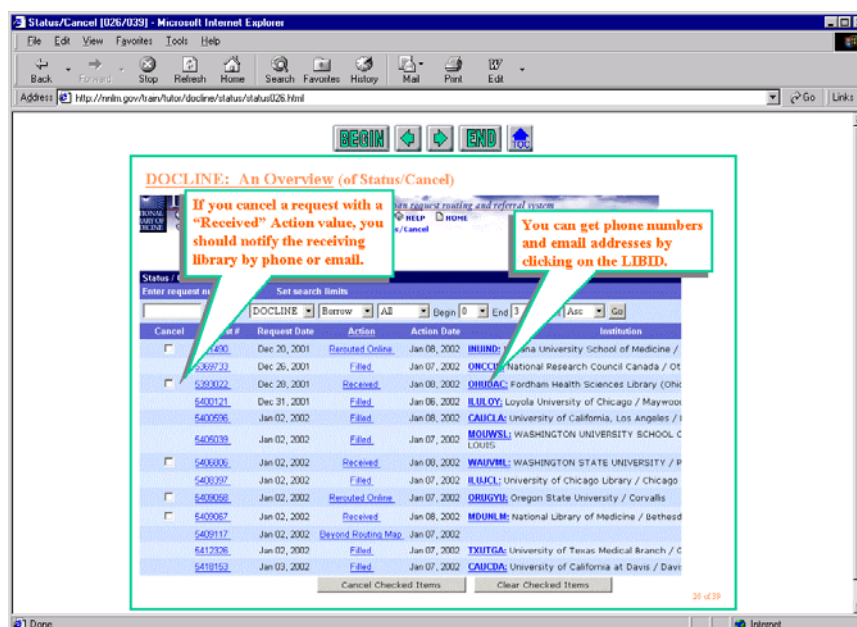
The Action value "NEW" means that the receiving library has not read the request and they do not know it was sent to them. If you cancel a request with a NEW Action value, you do not need to notify the receiving library.

III. The Status / Cancel Feature

On the other hand, a request with The Action value "Received" means that the receiving library has read the request and has already begun their work to fill it.



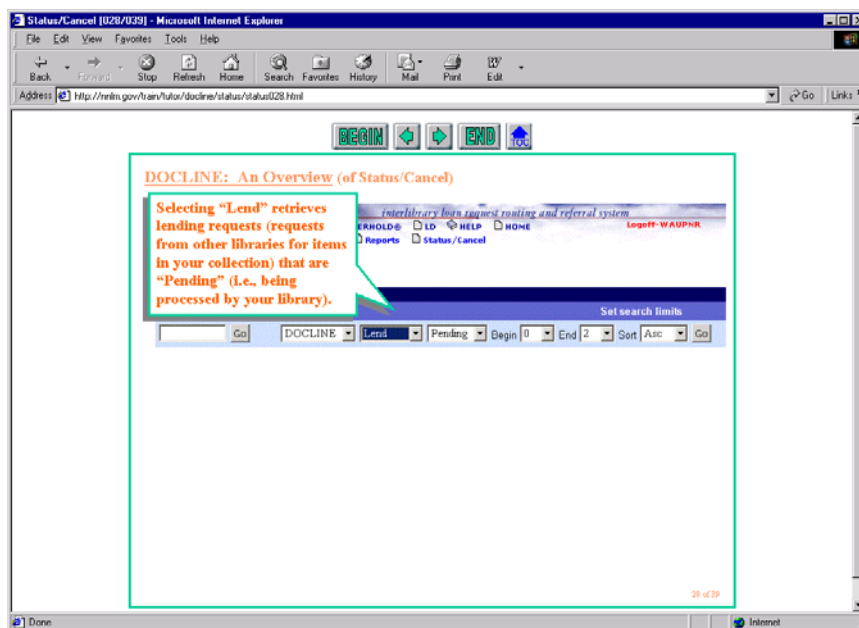
If you cancel a request with a "Received" action value, you should notify the receiving library by phone or e-mail. You can determine phone numbers and e-mail addresses by clicking on the appropriate LIBID link.



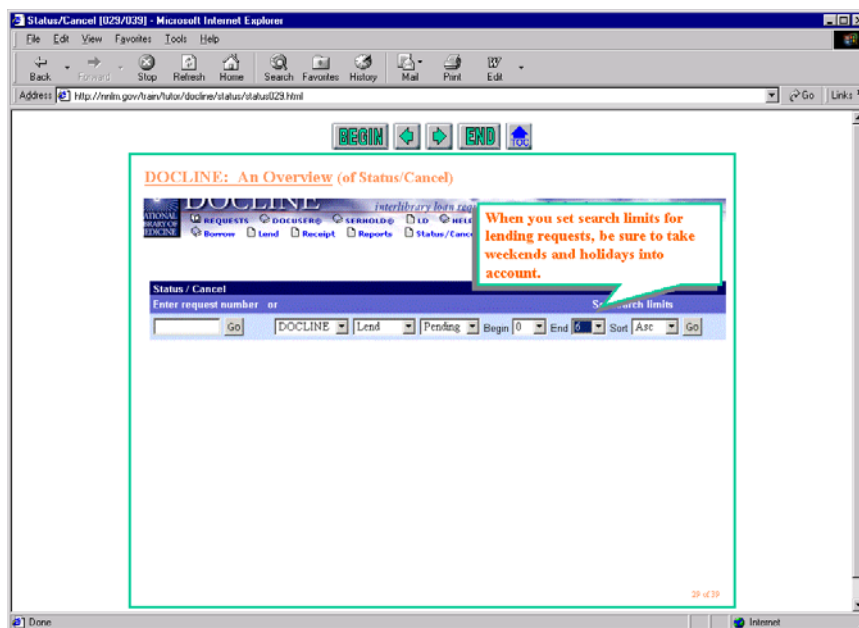
III. The Status / Cancel Feature

When you select "Lend", lending requests will be retrieved as those requests from other libraries for items in your collection. And when you also select "Pending", these are requests that are currently being processed by your library.

If you get a message "No requests found" in red, there are no further lend requests to process.

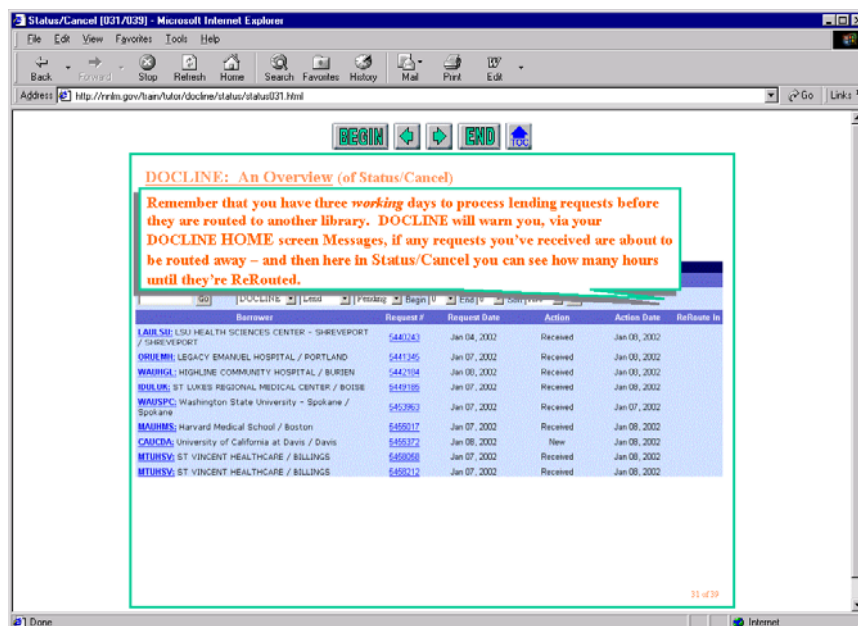


When you set search limits for lending requests, make sure to take weekends and holidays into account.

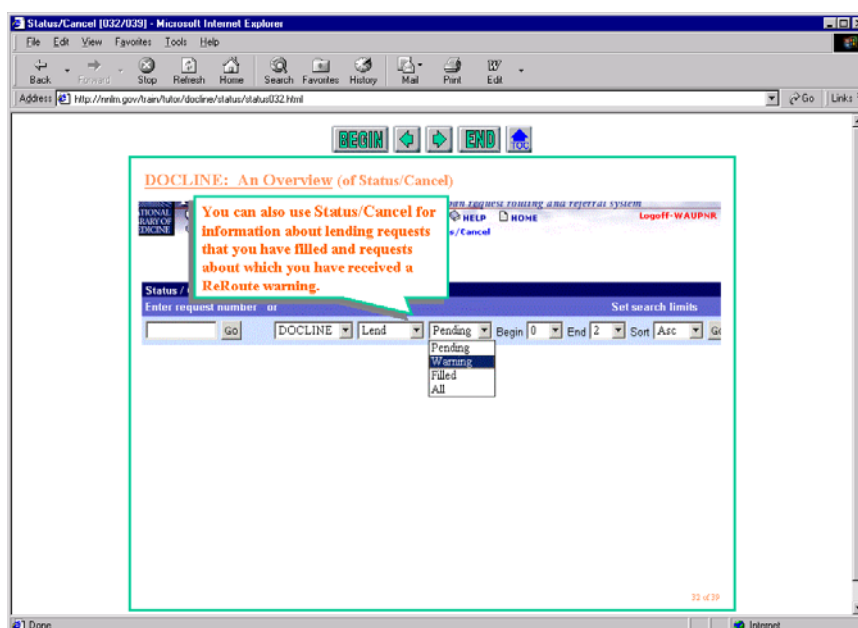


III. The Status / Cancel Feature

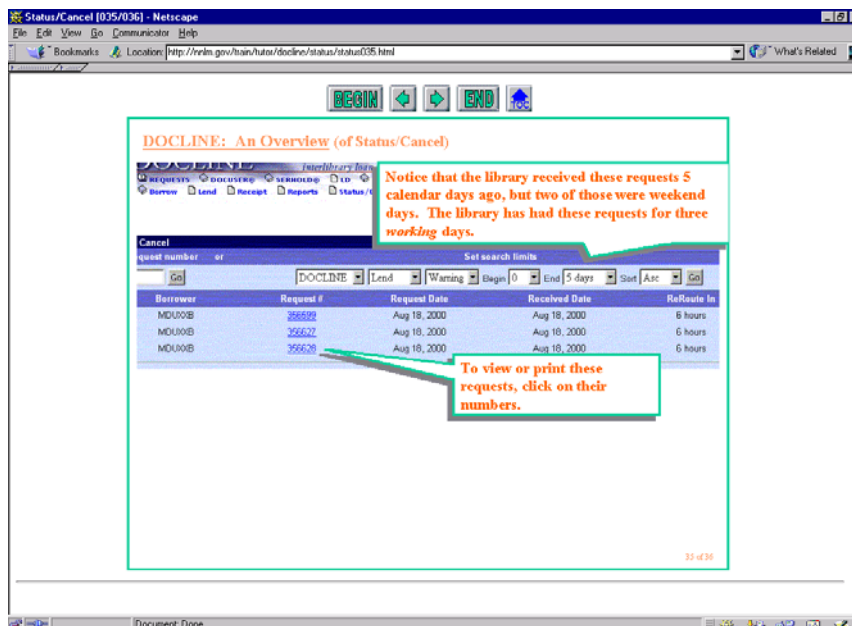
Remember that you have **three working days** to process lending requests before they are routed to another library. The DOCLINE Home Page will warn you with screen messages, if there are requests about to be re-routed, due to exceeded, allotted time limits. From the *Status/Cancel* screen, you can see how many hours are remaining in the sand dial.



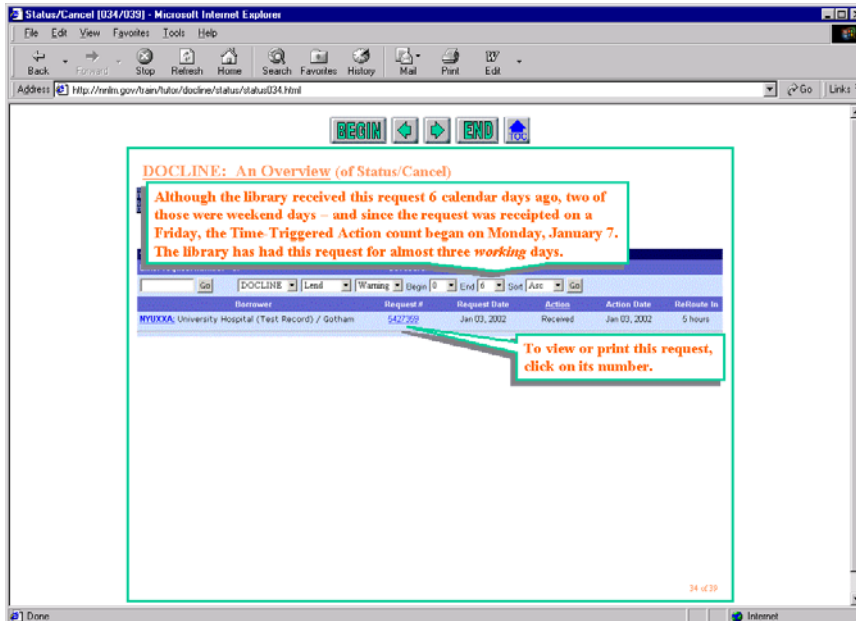
You can also view requests about which you have received a ReRoute warning.



III. The Status / Cancel Feature

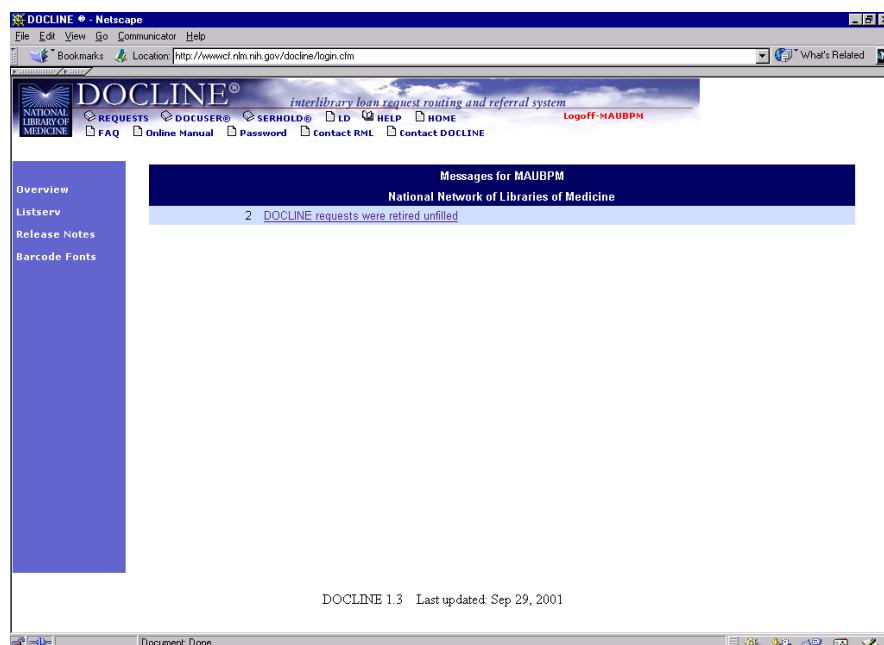


It is important to keep in mind about the Time-Triggered Action count of "three working days" (see below.)

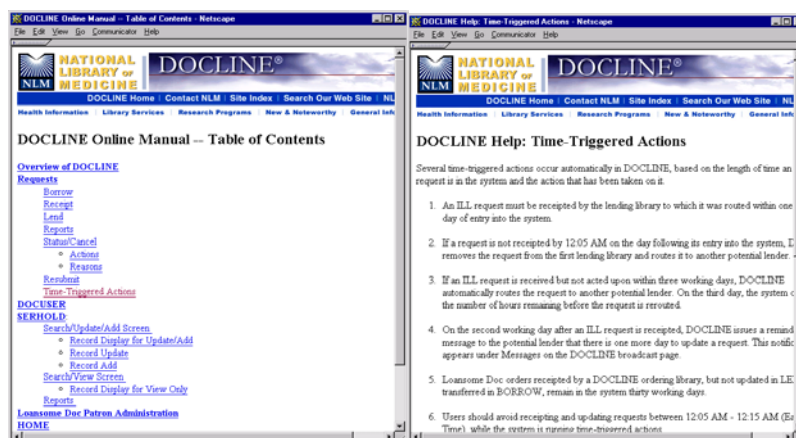


III. The Status / Cancel Feature

DOCLINE's Online Manual provides more information about how Time-Triggered Actions work; simply click **Help** from the Home Page (*see below*):



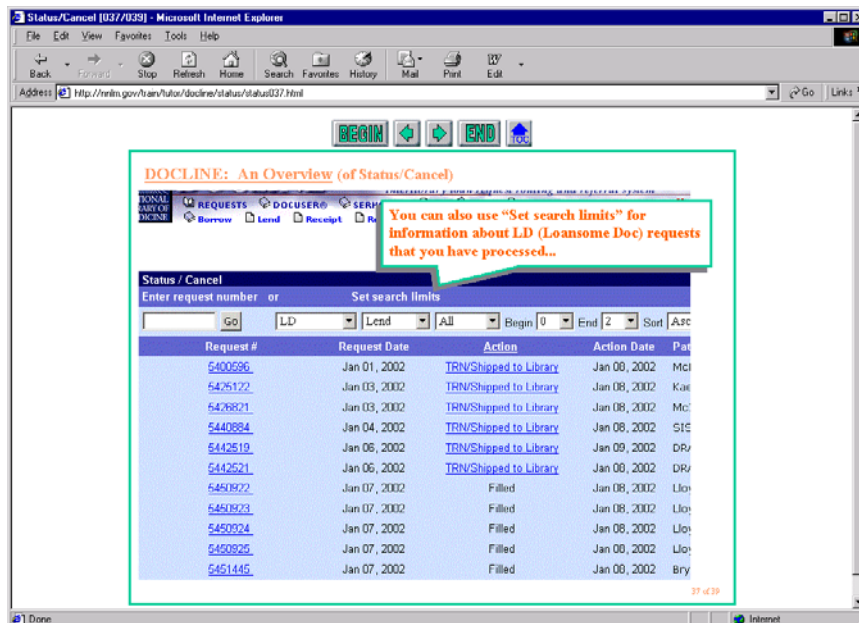
then, **Online Manual** (*see below*):



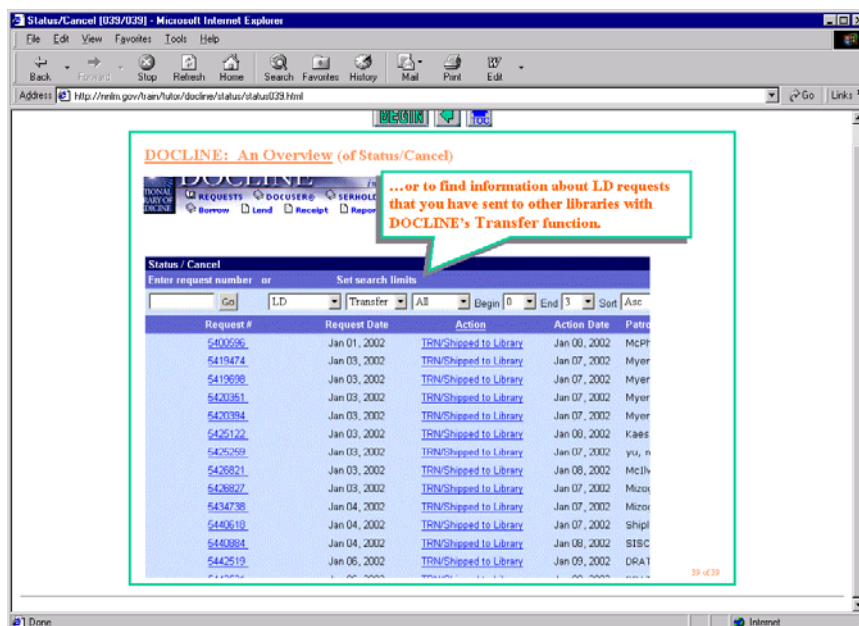
then, click the Time-Triggered Actions link.

III. The Status / Cancel Feature

You can also use the "Set search limits" for information about LD requests that you processed.



Or, to find information about LD requests that you sent to other libraries with DOCLINE's Transfer feature.



III. Reports

To initiate the Request Reports feature:

Step 1. Log into DOCLINE (*see Module I for instructions*).

Step 2. Click **REQUESTS**.

Step 3. Click **Reports**.



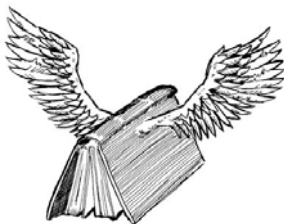
Here you can determine (**Report 1-7**) which libraries have you in their Routing Table. You can also view quarterly statistics for your library (**Reports 1-1A through 5-1B.**) Quarterly reports are NOT archived by NLM, so when a new quarter is loaded, data for the oldest quarter is replaced and is no longer available. It is recommended that you store data from NLM's quarterly statistical reports on your own computer for future retrieval.

III. Reports



A CLOSER LOOK

- Onsite PubMed training is available through the NN/LM NER Regional Office. Please contact Donna Berryman at 508-856-5962 --or-- donna.berryman@umassmed.edu.
- A DOCLINE tutorial is available online: <http://nnlm.gov/train/tutor/DOCLINE/>.
- Front-end ILL systems (e.g. CLIO, QuickDOC, OCLC's ILLiad, etc.) will generally provide better statistics. Please keep in mind that DOCLINE is NOT a front-end system.
- DOCLINE is expected to arrive at ISO/ILL Protocol compliance shortly; this will greatly improve the interface among diverse ILL systems in the future.



MODULE IV. SERHOLD*Table of Contents*

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SERHOLD EXERCISES	137

IV. SERHOLD Search/Update/Add

SERHOLD contains information about your library's serial holdings. With the **Search/Update/Add** function, you can:

- (a.) update holdings for journals in your library's collection; and
- (b.) add holdings for new titles.

To initiate a SERHOLD Search/Update/Add session:

- Step 1.* Log into DOCLINE (*see Module I for instructions*).
- Step 2.* Click **SERHOLD**.
- Step 3.* Click **Search/Update/Add**.

The screenshot shows the DOCLINE web interface in a Netscape browser window. The address bar shows the URL: <http://wwwcl.nlm.nih.gov/docline/login.cfm>. The DOCLINE logo is at the top left, with the tagline "interlibrary loan request routing and referral system". Navigation links include REQUESTS, DOCUSER, SERHOLD, LD, HELP, and HOME. A "Logoff-MAUBPN" link is on the right. The main content area is titled "SERHOLD LOCATOR" and "Bibliographic Search/Update/Add". It contains input fields for NLM Unique ID, ISSN, OCLC Number, and Journal Title / Title Abbreviation. Below these is a "Search Limits" section with checkboxes for Region, State/Province, Library Group, and My Library (checked). There are also "AND" and "OR" dropdown menus and a "LookUp LIBID" button. At the bottom, there are fields for "Volume(s) Owned" and "Year(s) Owned". A row of buttons at the bottom includes Search, Reset Bib Search, Reset Search Limits, Reset All, and Help.

Enter a journal title, title abbreviation, UI, ISSN or OCLC number. Your library is checked off as the default search limit.

IV. SERHOLD Search/Update/Add

If holdings are *already* listed in SERHOLD for your library, the holdings record will display. Click the **Update** button to make changes to your holdings statement.

DOCLINE® interlibrary loan request routing and referral system

Search criteria : 101124170 (NLM UNIQUE ID) Journal of infusion nursing : the official publication of th... (TITLE) 1533-1458 (ISSN) (OCoLC)45662535 (OCLC)

Add Holdings

Title: Journal of infusion nursing : the official publication of the Infusion Nurses Society.
 NLM Unique ID: 101124170
 Publisher: Lippincott Williams & Wilkins,
 Publication Date: 2001
 Continuation Notes: Continues: Journal of intravenous nursing.

ISSN: 1533-1458
 Place of Publication: Hagerstown, MD :
 Frequency: Bimonthly

To add holdings, check the appropriate library or libraries
☒ VAMC Bedford (Bedford, MA, LIBID: MAUVD)

Retention Policy:
☐ Retained for a limited period (6) ☒ Permanently retained (8)

Physical Format: Text (tu)

Completeness: Information not available or Retention is limited (3)

Commitment Level:
 No special commitment to retain title (2)

Acquisition Status:
☐ Currently receiving (4) ☒ No longer acquiring (5)

Holdings owned:

Begin Volume	End Volume	Begin Year	End Year

Insert Row Delete Reset Delete All Sort

Add Return to Search Reset Help

A "Begin Volume" and "Begin Year" with no "End Volume" and "End Year" indicates a "current" subscription. This may be also indicated by the "Acquisition Status" (see below.)

DOCLINE® interlibrary loan request routing and referral system

Search criteria : 7501160 (NLM UNIQUE ID) JAMA : the journal of the American Medical Association. (TITLE) 0098-7484 (ISSN) (OCoLC)01124917 (OCLC)

SERHOLD Update University of Massachusetts Medical Center (Worcester, MA, LIBID: MAUMAS)

Title: JAMA : the journal of the American Medical Association.
 NLM Unique ID: 7501160
 Publisher: American Medical Association,
 Publication Date: 1960.
 Continuation Notes: Continues: Journal of the American Medical Association.

ISSN: 0098-7484
 Place of Publication: Chicago :
 Frequency: Weekly

Retention Policy:
☐ Retained for a limited period (6) ☒ Permanently retained (8)

Physical Format: Text (tu)

Completeness: Information not available or Retention is limited (3)

Commitment Level:
 No special commitment to retain title (2)

Added/Modified: 02-21-2001 by MAS63
 Encoding Level: 3

Acquisition Status:
☐ Currently receiving (4) ☒ No longer acquiring (5)

Holdings owned:

Begin Volume	End Volume	Begin Year	End Year
173		1960	

Insert Row Delete Reset Delete All Sort

Update Add Different Format Return to Prev Reset Help

Note that with Release 1.4, the "Frequency Code" has been replaced with "Current Publication Frequency".

IV. SERHOLD Search/Update/Add

DOCLINE® interlibrary loan request routing and referral system

Search criteria : 7501160 (NLM UNIQUE ID) JAMA : the journal of the American Medical Association. (TITLE) 0098-7484 (ISSN) (OCoLC)01124917 (OCLC)

SERHOLD Update University of Massachusetts Medical Center (Worcester, MA; LIBID: MAUMAS)

Title: JAMA : the journal of the American Medical Association.
 NLM Unique ID: 7501160
 Publisher: American Medical Association,
 Publication Date: 1960.
 Continuation Notes: Continues: Journal of the American Medical Association.

ISSN: 0098-7484
 Place of Publication: Chicago :
 Frequency: Weekly

Retention Policy:
☐ Retained for a limited period (6) ☒ Permanently retained (8)
 Physical Format: Text (tu)
 Completeness: Information not available or Retention is limited (3)
 Commitment Level: No special commitment to retain title (2)
 Added/Modified: 02-21-2001 by MAS63
 Encoding Level: 3

Acquisition Status:
☒ Currently receiving (4) ☐ No longer acquiring (5)
 Holdings owned:

Begin Volume	End Volume	Begin Year	End Year
73		1960	

 Insert Row Delete Reset Delete All Sort

Update Add Different Format Return to Prev Reset Help

A "Begin Volume" and "Begin Year" with an "End Volume" and "End Year" indicates an "inactive" subscription. This may also be indicated by the "Acquisition Status" (see below.)

DOCLINE® interlibrary loan request routing and referral system

Search criteria : 7501160 (NLM UNIQUE ID) JAMA : the journal of the American Medical Association. (TITLE) 0098-7484 (ISSN) (OCoLC)01124917 (OCLC)

SERHOLD Update University of Massachusetts Medical Center (Worcester, MA; LIBID: MAUMAS)

Title: JAMA : the journal of the American Medical Association.
 NLM Unique ID: 7501160
 Publisher: American Medical Association,
 Publication Date: 1960.
 Continuation Notes: Continues: Journal of the American Medical Association.

ISSN: 0098-7484
 Place of Publication: Chicago :
 Frequency: Weekly

Retention Policy:
☐ Retained for a limited period (6) ☒ Permanently retained (8)
 Physical Format: Text (tu)
 Completeness: Information not available or Retention is limited (3)
 Commitment Level: No special commitment to retain title (2)
 Added/Modified: 02-21-2001 by MAS63
 Encoding Level: 3

Acquisition Status:
☒ Currently receiving (4) ☐ No longer acquiring (5)
 Holdings owned:

Begin Volume	End Volume	Begin Year	End Year
73		1960	

 Insert Row Delete Reset Delete All Sort

Update Add Different Format Return to Prev Reset Help

IV. SERHOLD Search/Update/Add

For those serial titles with **issue numbers** rather than **volumes**, you may enter issue numbers in the *Volume* fields (see below.)

The screenshot shows the DOCLINE SERHOLD Update form for JAMA. The form is titled "SERHOLD Update" and is for the University of Massachusetts Medical Center (Worcester, MA; LIBID: MAUMAS). The search criteria are: 7501160 (NLM UNIQUE ID) JAMA : the journal of the American Medical Association. (TITLE) 0098-7484 (ISSN) (OCLC) 01124917 (OCLC).

The form fields include:

- Title: JAMA : the journal of the American Medical Association.
- NLM Unique ID: 7501160
- Publisher: American Medical Association, 1960.
- Publication Date: 1960.
- Continuation Notes: Continues: Journal of the American Medical Association.
- ISSN: 0098-7484
- Place of Publication: Chicago :
- Frequency: Weekly

The Retention Policy section shows:

- Retention Policy: ☐ Retained for a limited period (6) ☒ Permanently retained (8)
- Physical Format: Text (tu)
- Completeness: Information not available or Retention is limited (3)
- Commitment Level: No special commitment to retain title (2)
- Added/Modified: 02-21-2001 by MAS63
- Encoding Level: 3

The Acquisition Status section shows:

- Acquisition Status: ☒ Currently receiving (4) ☐ No longer acquiring (5)
- Holdings owned:

Begin Volume	End Volume	Begin Year	End Year
873		1960	

Buttons at the bottom include: Update, Add Different Format, Return to Prev, Reset, Help.

Use of the "Completeness" and "Commitment Level" will depend on your library's policies. Many libraries leave these fields as they are (see below.)

This screenshot is identical to the one above, showing the DOCLINE SERHOLD Update form for JAMA. The form is titled "SERHOLD Update" and is for the University of Massachusetts Medical Center (Worcester, MA; LIBID: MAUMAS). The search criteria are: 7501160 (NLM UNIQUE ID) JAMA : the journal of the American Medical Association. (TITLE) 0098-7484 (ISSN) (OCLC) 01124917 (OCLC).

The form fields include:

- Title: JAMA : the journal of the American Medical Association.
- NLM Unique ID: 7501160
- Publisher: American Medical Association, 1960.
- Publication Date: 1960.
- Continuation Notes: Continues: Journal of the American Medical Association.
- ISSN: 0098-7484
- Place of Publication: Chicago :
- Frequency: Weekly

The Retention Policy section shows:

- Retention Policy: ☐ Retained for a limited period (6) ☒ Permanently retained (8)
- Physical Format: Text (tu)
- Completeness: Information not available or Retention is limited (3)
- Commitment Level: No special commitment to retain title (2)
- Added/Modified: 02-21-2001 by MAS63
- Encoding Level: 3

The Acquisition Status section shows:

- Acquisition Status: ☒ Currently receiving (4) ☐ No longer acquiring (5)
- Holdings owned:

Begin Volume	End Volume	Begin Year	End Year
873		1960	

Buttons at the bottom include: Update, Add Different Format, Return to Prev, Reset, Help.

IV. SERHOLD Search/Update/Add

You can also select a Retention Policy of "*Retained for a limited period*" and indicate length of time the title is retained (*see below.*)

DOCLINE® interlibrary loan request routing and referral system

Search criteria : 7501160 (NLM UNIQUE ID) JAMA : the journal of the American Medical Association. (TITLE) 0098-7484 (ISSN) (OCoLC)01124917 (OCLC)

SERHOLD Update University of Massachusetts Medical Center (Worcester, MA; LIBID: MAUMAS)

Title: JAMA : the journal of the American Medical Association.
 NLM Unique ID: 7501160
 Publisher: American Medical Association.
 Publication Date: 1960.
 Continuation Notes: Continues: Journal of the American Medical Association.

ISSN: 0098-7484
 Place of Publication: Chicago :
 Frequency: Weekly

Retention Policy:
☒ Retained for a limited period (6) ☐ Permanently retained (8)

Physical Format:
 Text (tu)

Completeness: Information not available or Retention is limited (3)
 Commitment Level:
 No special commitment to retain title (2)
 Added/Modified: 02-21-2001 by MAS63
 Encoding Level: 3

Holdings owned:
 Latest Month Year Edition

Update Add Different Format Return to Prev Reset Help

This limited retention period will appear on the holdings record for your library.

DOCLINE® interlibrary loan request routing and referral system

Search criteria : 7501160 (NLM UNIQUE ID) JAMA : the journal of the American Medical Association. (TITLE) 0098-7484 (ISSN) (OCoLC)01124917 (OCLC)

SERHOLD Update University of Massachusetts Medical Center (Worcester, MA; LIBID: MAUMAS)

Title: JAMA : the journal of the American Medical Association.
 NLM Unique ID: 7501160
 Publisher: American Medical Association.
 Publication Date: 1960.
 Continuation Notes: Continues: Journal of the American Medical Association.

ISSN: 0098-7484
 Place of Publication: Chicago :
 Frequency: Weekly

Retention Policy:
☐ Retained for a limited period (6) ☒ Permanently retained (8)

Physical Format:
 Text (tu)

Completeness: Information not available or Retention is limited (3)
 Commitment Level:
 No special commitment to retain title (2)
 Added/Modified: 02-21-2001 by MAS63
 Encoding Level: 3

Acquisition Status:
☒ Currently receiving (4) ☐ No longer acquiring (5)

Holdings owned:

Begin Volume/End Volume	Begin Year	End Year
73	1960	

 Insert Row Delete Reset Delete All Sort

Update Add Different Format Return to Prev Reset Help

IV. SERHOLD Search/Update/Add

For those serial titles with a "holdings gap", click the **Insert Row** button to indicate years that are non-contiguous (*see below.*) There is no limit to the number of gaps you can show in your holdings.

Remember: always click the **Update** button to record changes to your SERHOLD record. Changes are made "*in real time*" (that is, they can be viewed on the screen *immediately.*)

IV. SERHOLD Search/Update/Add

Click the **Add Different Format** button to indicate a different physical format for an already existing entry. Often, different formats will be assigned different ISSN numbers, and this should be reflected in the holdings.

The screenshot shows the DOCLINE SERHOLD Update interface. The search criteria are: 0226533 (NLM UNIQUE ID) Psychiatric news. (TITLE) 0033-2704 (ISSN) (OCLC)02266577 (OCLC). The title is 'Psychiatric news.' and the publisher is 'American Psychiatric Association'. The publication date is 1966. The continuation notes state: 'Supersedes: A.P.A. newsletter and mail pouch.' The retention policy is set to 'Permanently retained (8)'. The acquisition status is 'Currently receiving (4)'. The physical format dropdown menu is open, showing a list of 87 formats, including 'Text (tu)', 'Text, regular print (ta)', 'Text, large print (tb)', 'Text, Braille (tc)', 'Text, looseleaf (td)', 'Text, other (tz)', 'Videorecording (vu)', 'Videorecording, videocartridge (vc)', 'Videorecording, videodisc (vd)', 'Videorecording, videocassette (vf)', 'Videorecording, videoreel (ve)', 'Computer file, computer optical disc cartridge (cc)', 'Computer file, tape cassette (cf)', 'Computer file, tape reel (ch)', 'Computer file, magnetic disk (cj)', 'Computer file, magneto-optical disk (cm)', 'Computer file, optical disc (co)', 'Computer file, remote (cr)', 'Computer file, other (cz)', 'Globe (du)', 'Globe, celestial (da)', and 'Globe, planetary or lunar (db)'. The 'Add Different Format' button is visible at the bottom of the dropdown menu.

Click the the drop down arrow to view the list of formats to choose from 87 different formats!

This screenshot is identical to the one above, showing the DOCLINE SERHOLD Update interface with the 'Physical Format' dropdown menu open, displaying a list of 87 formats. The search criteria, title, publisher, and other details remain the same. The 'Add Different Format' button is highlighted at the bottom of the dropdown list.

IV. SERHOLD Search/Update/Add

To **add** a title, enter the Journal Title, Title Abbreviation, UI, ISSN or OCLC number and click the **Search** button. The "My Library" checkbox is checked off as the default search limit:

DOCLINE® interlibrary loan request routing and referral system
Logoff-HAUBPH

SEARCH/UPDATE/ADD

NLM Unique ID: _____ ISSN: _____ OCLC Number: _____

Journal Title / Title Abbreviation: _____

Search Limits

☐ Region ☐ State/Province ☐ Library Group ☒ My Library

AND Input LIBID (up to 10): _____ LookUp LIBID

Volume(s) Owned _____ to _____ Year(s) Owned _____ to _____

Search Reset Dib Search Reset Search Limits Reset All Help

The *Add Holdings* screen automatically displays (see below.) Complete holdings information and acquisition status must be completed to add the journal title. Click the **Add** button to record the addition. [Please note only years have been entered for this series.]

DOCLINE® interlibrary loan request routing and referral system
Logoff-HAUBPH

Search criteria: 0013-7006 (ISSN)

Add Holdings

Title: L'Encéphale.

NLM Unique ID: 7505643 ISSN: 0013-7006

Publisher: Editions Doin Deren Et Cie Place of Publication: Paris

Publication Date: 1906. Frequency: b

To add holdings, check the appropriate library or libraries

☒ National Network of Libraries of Medicine (Shrewsbury, MA, LIBID: HAUBPM) [Demo]

Retention Policy:

☐ Retained for a limited period (6) ☒ Permanently retained (8)

Physical Format: Text (tu)

Completeness: Information not available or Retention is limited (7)

Commitment Level: No special commitment to retain title (2)

Acquisition Status:

☐ Currently receiving (4) ☒ No longer acquiring (5)

Holdings owned	Begin Year	End Year
	1906	1909
	1911	1913
	1927	
	1932	

Insert Row Delete Reset Delete All Sort

Add Return to Search Reset Help

IV. SERHOLD Search/Update/Add

If you forget to click on one of two radio buttons to indicate *Acquisition Status*, a message box will pop up reminding you to do so before the record is added to your holdings.



Click one of the *Acquisition Status* radio buttons (*see below*):

Then, click the **Add** button and SERHOLD will confirm that you were successful in adding your library's holdings for that title (*see below*).



Your library's new holdings is then immediately displayed (*see below*.)
[Note the button at the bottom of the screen changing from **Add** to **Update**.]

IV. SERHOLD Search/Update/Add

If you do not know: the correct Journal Title, Title Abbreviation, UI, ISSN, **or** OCLC number, select the **LOCATORplus** tab to search the NLM's catalog (OPAC).

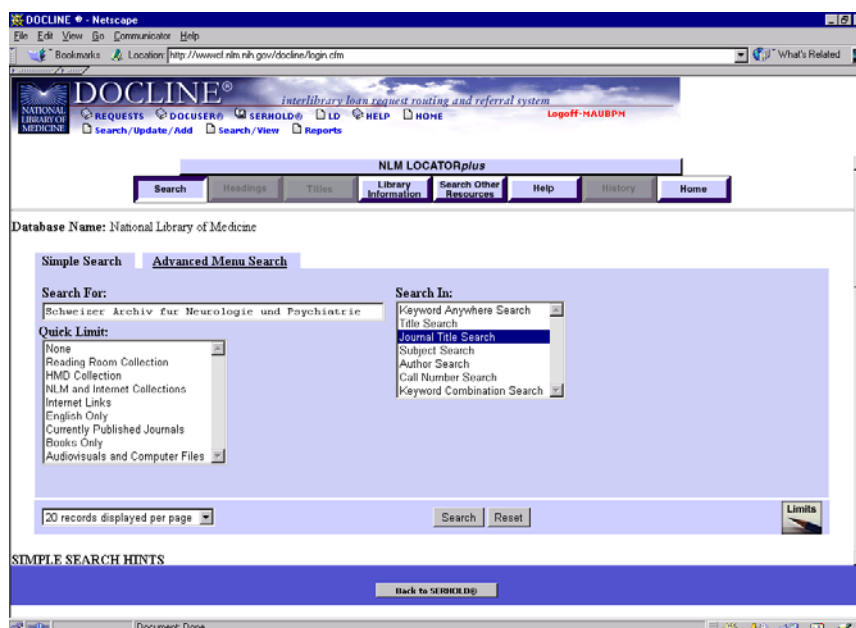
The screenshot shows the DOCLINE web interface in a Netscape browser. The page title is "DOCLINE - Netscape". The address bar shows "http://www.nlm.nih.gov/docline/login.cfm". The DOCLINE logo is at the top left, with the tagline "interlibrary loan request routing and referral system". Navigation links include REQUESTS, DOCUSER, SERHOLD, LD, HELP, HOME, and a Logoff button. The SERHOLD tab is active, showing a "Bibliographic Search/Update/Add" form. The form includes input fields for NLM Unique ID, ISSN, OCLC Number, and Journal Title / Title Abbreviation. Below these are "Search Limits" with checkboxes for Region, State/Province, Library Group, and My Library (checked). There are also fields for "Input LIBID (up to 10)" and "Volume(s) Owned" to "Year(s) Owned". At the bottom are buttons for Search, Reset Bib Search, Reset Search Limits, Reset All, and Help.

Please notice how LOCATORplus opens up within SERHOLD (see below.)

The screenshot shows the NLN LOCATORplus interface. The browser title is "DOCLINE - Netscape". The address bar shows "http://www.nlm.nih.gov/docline/login.cfm". The DOCLINE logo is at the top left. Navigation links include REQUESTS, DOCUSER, SERHOLD, LD, HELP, HOME, and a Logoff button. The SERHOLD tab is active, showing the "NLN LOCATORplus" section. Below this is a "Database Name: National Library of Medicine" section. The "Simple Search" tab is selected, showing a "Search For:" field and a "Search In:" dropdown menu. The "Search In:" dropdown is open, showing options: Keyword Anywhere Search, Title Search, Journal Title Search, Subject Search, Author Search, Call Number Search, and Keyword Combination Search. There is also a "Quick Limit:" dropdown menu with options: None, Reading Room Collection, NLM Collection, NLM and Internet Collections, Internet Links, English Only, Currently Published Journals, Books Only, and Audiovisuals and Computer Files. At the bottom are buttons for Search, Reset, and Limits. A "SIMPLE SEARCH HINTS" section is at the very bottom with a "Back to SERHOLD" button.

IV. SERHOLD Search/Update/Add

Use any LOCATORplus search option.

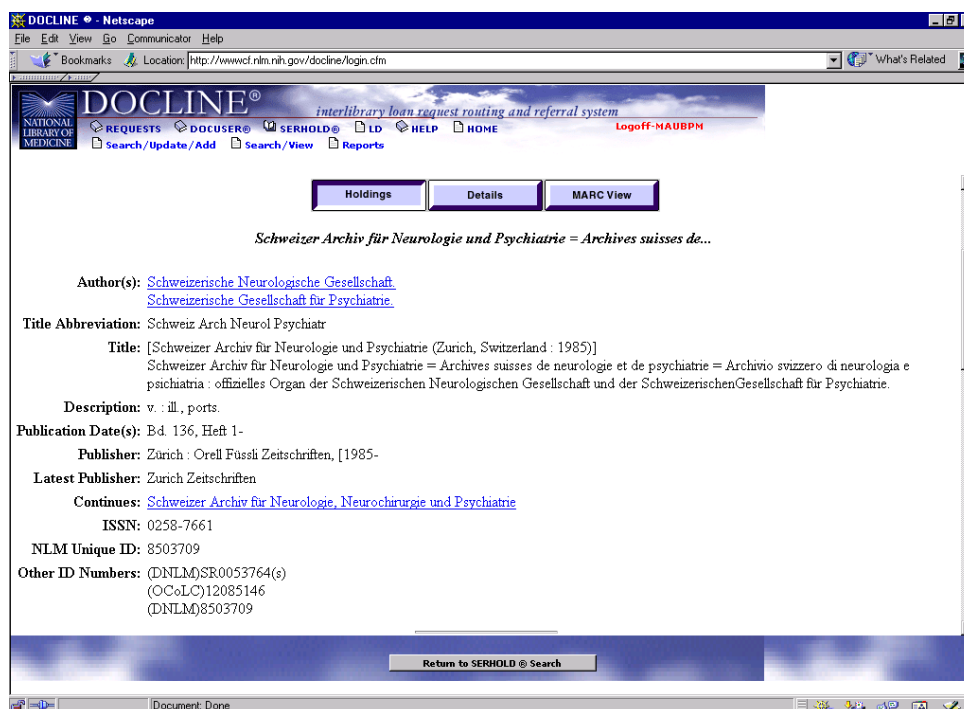


In this example (see below), we are conducting a search on Title with two results.

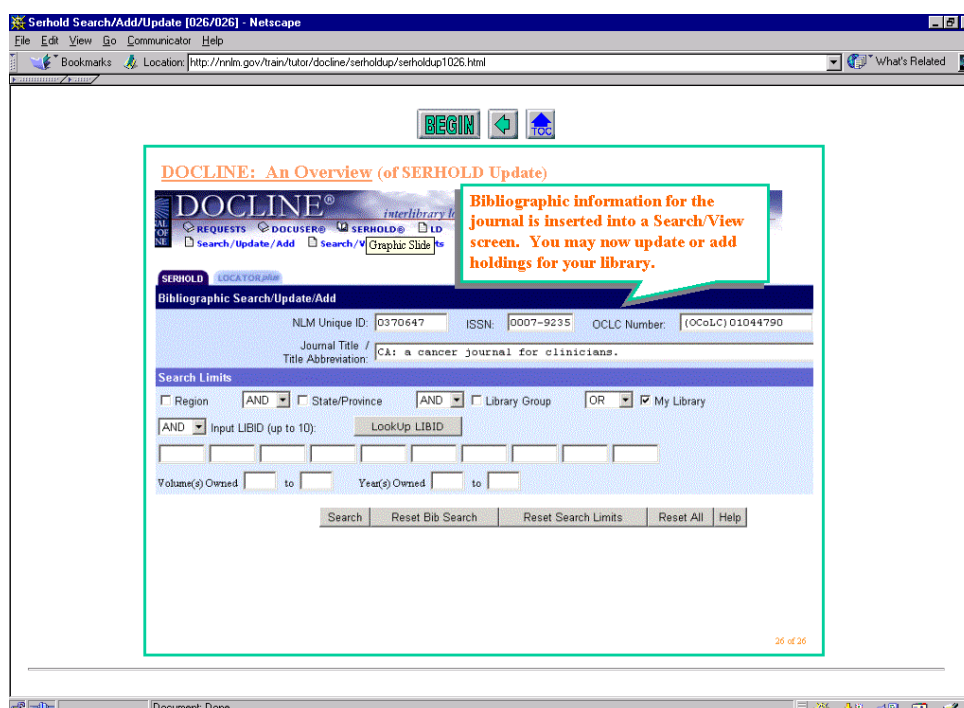


IV. SERHOLD Search/Update/Add

When you have located the journal's bibliographic record (see below), click the **Return to SERHOLD® Search** button.



Bibliographic information for the journal is inserted into a *Search/View* screen. You may now update or add holdings for your library.



IV. SERHOLD Search/View

SERHOLD contains information about your library's serial holdings. With the **Search/View** function, you can: (a.) search for the bibliographic records of specific journal titles; and (b.) view which libraries own these records.

To initiate a SERHOLD Search session:

Step 1. Log into DOCLINE (*see Module I for instructions*).

Step 2. Click **SERHOLD**.

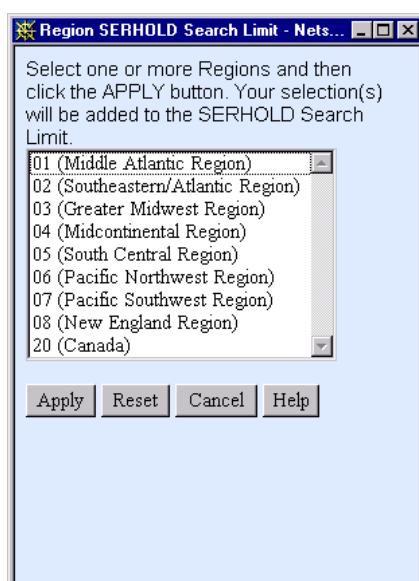
Step 3. Click **Search/View**.

The screenshot shows the DOCLINE web interface in a Netscape browser window. The address bar displays the URL <http://www.nlm.nih.gov/docline/login.cfm>. The page header includes the DOCLINE logo and navigation links: REQUESTS, DOCUSER, SERHOLD, RML, LD, HELP, HOME, and a Logoff-MAUMAS link. Below the header, the SERHOLD section is active, showing the 'Bibliographic Search/View' form. This form includes input fields for NLM Unique ID, ISSN, OCLC Number, Journal Title, and Title Abbreviation. A 'Search Limits' section contains checkboxes for Region, State/Province, Library Group, and My Library, along with AND/OR dropdown menus. There is also a field for 'Input LIBID (up to 10):' with a 'LookUp LIBID' button. At the bottom of the form, there are fields for 'Volume(s) Owned' and 'Year(s) Owned'. The bottom of the page features buttons for Search, Reset Bib Search, Reset Search Limits, Reset All, and Help.

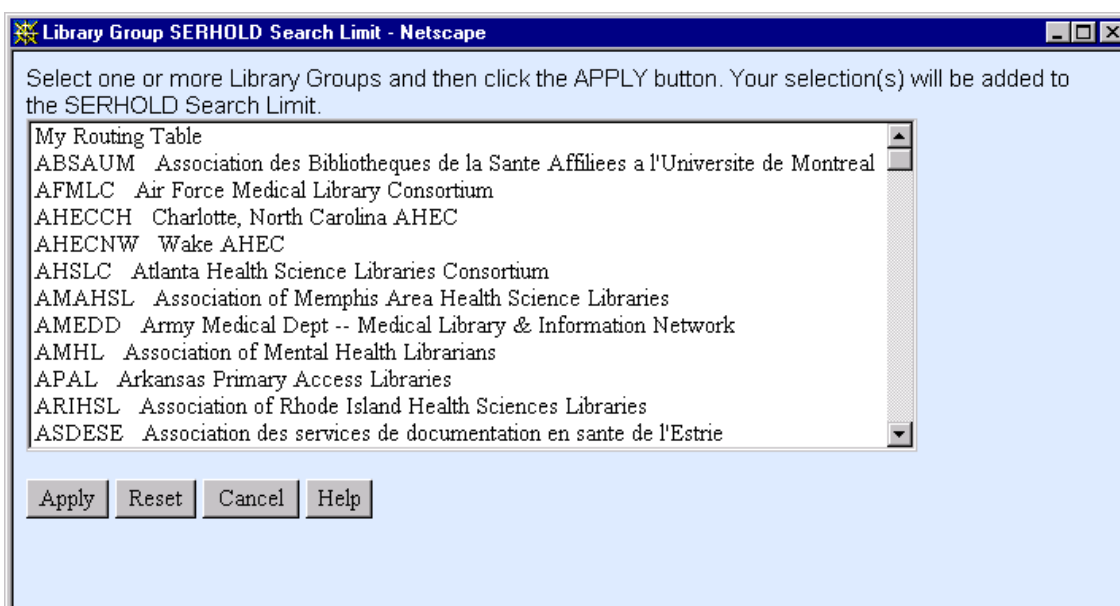
IV. SERHOLD Search/View

To find the bibliographic record for a particular journal, enter the journal title, title abbreviation, UI, ISSN or OCLC number.

For *Search Limits*, you can check the **Region** box, highlight your selection, and click the **Apply** button. You can also search by state or province.

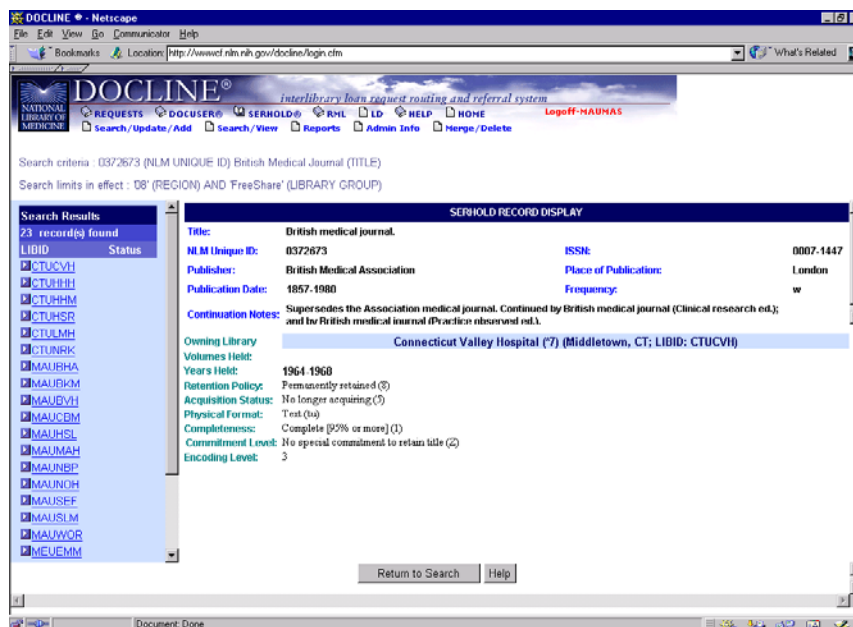


You can also limit your search by selecting library groups within the Library Group list box. To select more than one group, hold down the **Control <Ctrl>** key and highlight each selection.

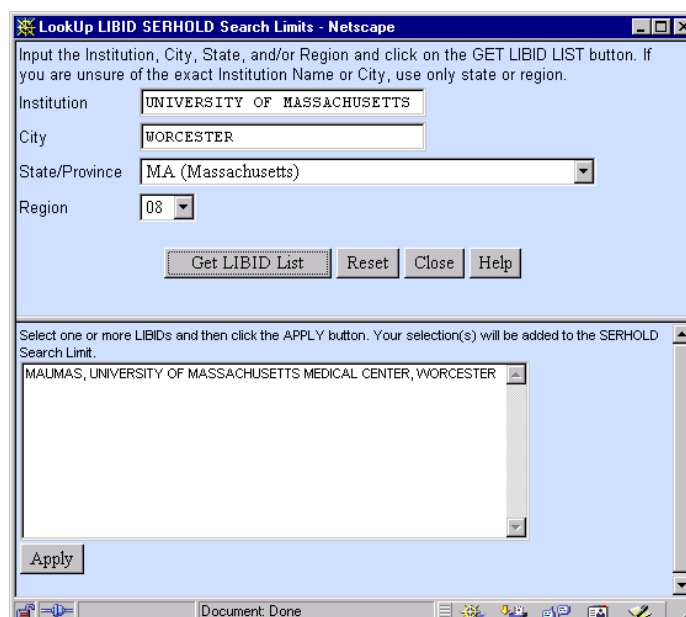


IV. SERHOLD Search/View

You can also search up to ten (10) individual libraries' holdings by entering their LIBID's. Click the **LookUp LIBID** button for help finding LIBID's.



Highlight the selection and click the **Apply** button -- the LIBID(s) will be added to the search strategy.



IV. SERHOLD Search/View

Please note the LIBID "MAUMAS" added to the search screen, below.

DOCLINE® interlibrary loan request routing and referral system

Logoff-MAUBPH

SERHOLD LOCATOR.php

Bibliographic Search/View

NLM Unique ID: 0900488 ISSN: 09590130 OCLC Number:

Journal Title / Title Abbreviation:

Search Limits

☐ Region ☐ AND ☐ State/Province ☐ AND ☐ Library Group ☐ OR ☐ My Library

☐ AND Input LIBID (up to 10): LookUp LIBID

MAUMAS MAUHMS MAUTUF

Volume(s) Owned to Year(s) Owned to

Search Reset Bib Search Reset Search Limits Reset All Help

Click the **Search** button to begin your search.

DOCLINE® interlibrary loan request routing and referral system

Logoff-MAUBPH

Search criteria: 8900488 (NLM UNIQUE ID), 09590130 (ISSN)

Search limits in effect: MAUMAS, MAUHMS, MAUTUF (LIBRARY)

Search Results

4 records found

LIBID Status

MAUHMS

MAUHMS

MAUMAS

MAUTUF

SERHOLD RECORD DISPLAY

Title: BMJ (Clinical research ed.)

NLM Unique ID: 8900488 ISSN: 0959-0130

Publisher: British Medical Association Place of Publication: London

Publication Date: 1900 Frequency: w

Confirmation Notes: Continues: British medical journal (Clinical research ed.)

Owning Library: Harvard Medical School (Boston, MA; LIBID: MAUHMS)

Volumes Held: 297-300

Years Held: 1900-1909

Retention Policy: Permanently retained (C)

Acquisition Status: No longer acquiring (C)

Physical Format: Text (tu)

Completeness: Other (limited retention; or, no estimate of completeness) (C)

Commitment Level: No special commitment to retain title (C)

Encoding Level: 3

Return to Search Help

The search yielded four (4) libraries in Region 8 that holds BMJ (Clinical Research ed.)

IV. SERHOLD Search/View

Click a LIBID link to view that particular library's holdings. Click the arrow to the left of the LIBID and you can view a library's ILL information from DOCUSER (remember Module II?)

ILL Info Window - Netscape

Harvard Medical School (MAUHMS)
ILL Contact: Susan Lieberthal
 Phone: 1 617 432-2128
 Fax: 1 617 432-4738
 Email: slieberthal@hms.harvard.edu

ILL Delivery Methods:
 Will send via: Ariel, Fax, Mail
 Will receive via: Ariel, Email(PDF), Fax, Mail

ILL Charges:
 Audiovisual
 Copy \$11.00 50 PGS.
 Fax \$9.00 Telefax Problems May Be Reported To 617-432-2128
 Bound Journal
 Unbound Journal
 Original \$11.00
 Referrals \$0.00
 Other Rare Book ILLS Require Special Handling; No Book Renewals

Library Groups:
 EFTS
 MAHSLIN
 RESOURCE

DOCUSER Record Close Window

If you don't know the correct Journal Title, Title Abbreviation, UI, ISSN or OCLC number, select the **LOCATORplus** tab to search NLM's catalog. LOCATORplus opens within SERHOLD.

DOCLINE interlibrary loan request routing and referral system
 Logoff-NAUBPN

NLM LOCATORplus

Database Name: National Library of Medicine

Simple Search Advanced Menu Search

Search For:

Quick Limit:
 None
 Reading Room Collection
 HMD Collection
 NLM and Internet Collections
 Internet Links
 English Only
 Currently Published Journals
 Books Only
 Audiovisuals and Computer Files

Search In:
 Keyword Anywhere Search
 Title Search
 Journal Title Search
 Subject Search
 Author Search
 Call Number Search
 Keyword Combination Search

20 records displayed per page Search Reset Limits

SIMPLE SEARCH HINTS

Back to SERHOLD

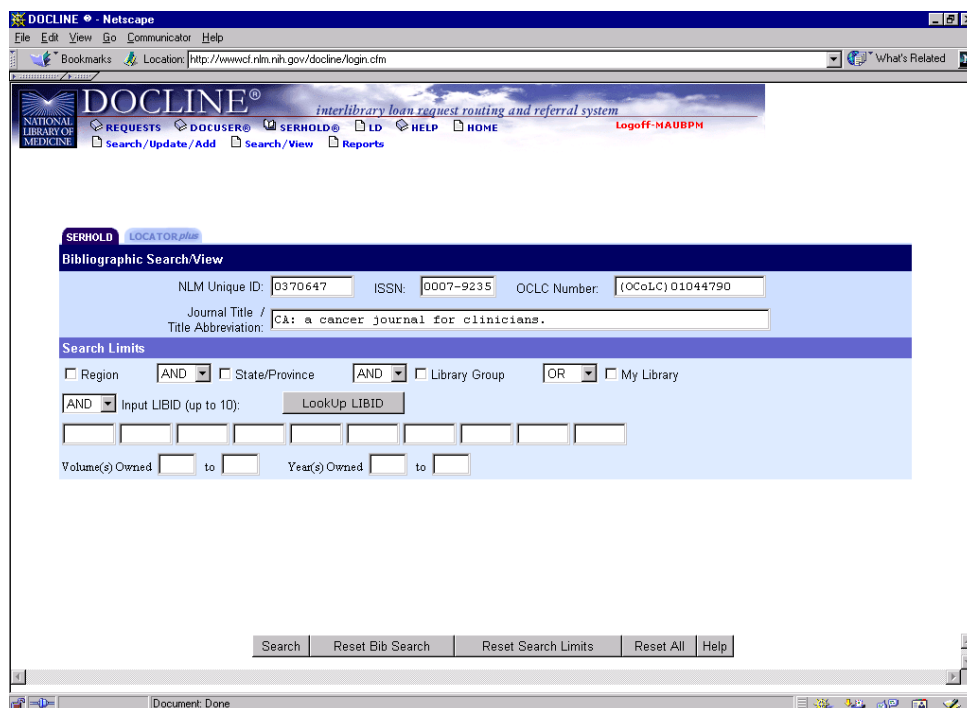
When you find the journal's bibliographic record, click the **Back to SERHOLD** button. Bibliographic information for the journal is inserted into a *Search/View* screen. You will want to (a.) set the Search Limits; (b.) conduct your search; and (c.) view the libraries' holdings.

IV. SERHOLD Search/View

Often a journal has a subtitle; this subtitle must be included in a SERHOLD search since it is officially part of the journal's title. A LOCATORplus search can reveal a subtitle. When you find the journal's bibliographic record, click the **Back to SERHOLD®** button.



Bibliographic information for the journal is inserted into a *Search/View* screen (see below.) You may now search for libraries that own this title.



IV. SERHOLD Search/View

Now, let's take another example: we want to determine which "Freeshare" libraries in New England (Region 8) have serial holdings in *Nature Immunology*, a relatively new serial title. We have boxes checked off for **Region** and **Library Group**, following selections from their respective list boxes.

DOCLINE® - Netscape

interlibrary loan request routing and referral system

Logoff-NAUMAS

Search limits in effect: '08' (REGION) AND 'FreeShare' (LIBRARY GROUP)

SERHOLD LOCATORplus

Bibliographic Search/View

NLM Unique ID: ISSN: OCLC Number:

Journal Title / Title Abbreviation:

Search Limits

☒ Region ☐ State/Province ☒ Library Group ☐ My Library

AND Input LIBID (up to 10):

Volume(s) Owned to Year(s) Owned to

Next, we search LOCATORplus to bring in the appropriate bibliographic information for the journal.

DOCLINE® - Netscape

interlibrary loan request routing and referral system

Logoff-NAUMAS

NLM LOCATORplus

Database Name: National Library of Medicine

Simple Search **Advanced Menu Search**

Search For:

Quick Limit:

Search In:

Simple Search Hints

IV. SERHOLD Search/View

Once you click on the **Back to SERHOLD** button, the bibliographic information is automatically brought into the search record (see below.)

Click the **Search** button.

The search yielded one (1) library in Region 8 that belongs to Freeshare AND has holdings for the serial title *Nature Immunology* (see below.)

SERHOLD RECORD DISPLAY			
Title:	Nature Immunology.		
NLM Unique ID:	100941354	ISSN:	1529-2908
Publisher:	Nature America Inc.	Place of Publication:	New York, NY:
Publication Date:	2000.	Frequency:	m
Owning Library			
The Jackson Laboratory (Bar Harbor, ME; LIBID: MEUJL)			
Volumes Held:	1 -		
Years Held:	2000 -		
Retention Policy:	Permanently retained (3)		
Acquisition Status:	Currently receiving (4)		
Physical Format:	Text (10)		
Completeness:	Other (limited retention, or, no estimate of completeness) (0)		
Commitment Level:	No special commitment to retain title (2)		
Encoding Level:	3		

IV. SERHOLD Reports

With the SERHOLD **Reports** function, you can:

- (a.) produce various lists and your library's journal holdings; and
- (b.) produce union lists of your holdings for library groups and for libraries in your state or province.

To initiate a SERHOLD Reports session:

Step 1. Log into DOCLINE (*see Module I for instructions*).

Step 2. Click **SERHOLD**.

Step 3. Click **Reports**.



The first step: Select a report and initiate a request by checking on the appropriate link.



KEY NOTE

Report requests often run the same night. You will receive a message on your DOCLINE® Home screen when your list of holdings is ready. Your institution name will appear in **Blue** and you can print off a nice, clean copy of your holdings.

IV. SERHOLD Reports

Choose **Standard** ("ready to be printed") or **Delimited** ("can be imported into a database or spreadsheet") report format type. Title, Holdings, Library Name, and NLM Unique ID display on all reports. Select additional fields to display by holding down the **Control <CTRL>** key. After choosing your report specifications, click the **Submit Report** button.

The screenshot shows the DOCLINE web interface in Netscape. The main content area is titled "SERHOLD Reports" and contains a form for generating reports. The form has three main sections: "Report Format Type", "Select LIBID", and "Select Report Fields".

- Report Format Type:** Includes radio buttons for "Standard" (selected) and "Delimited". Below these are checkboxes for "Field Delimiter" and "Text Delimiter", and a section for "First row consists of field names" with "Yes" and "No" radio buttons.
- Select LIBID:** A dropdown menu showing "MAUBPM".
- Select Report Fields:** A list of fields with checkboxes, including "Acquisition Status", "City", "Commitment Level", "Completeness", "Continuation Notes", "Date Added/Modified", "Encoding Level", "Frequency", "Holdings" (checked), "ISSN", "Library Name", "NLM Unique ID" (checked), "OCLC Number", "Physical Format", "Place of Publication", "Publication Date", "Publisher", "Retention Policy", "State/Province", "Title" (checked), "Title Abbreviation", and "Update ID".

At the bottom of the form are buttons for "Submit Report", "Reset", and "Help". A sidebar on the left contains links for "Submit Reports", "Holdings by Library", "Holdings Not Updated within One Year", "Holdings Outside of Publication Date", "Level 2 Holdings", "NLM Serial Title Changes", "Reports Submitted", "Review/Cancel Submitted Report(s)", "Reports Ready", "Union List Products", and "Union Lists".

Confirmation message (see below.)

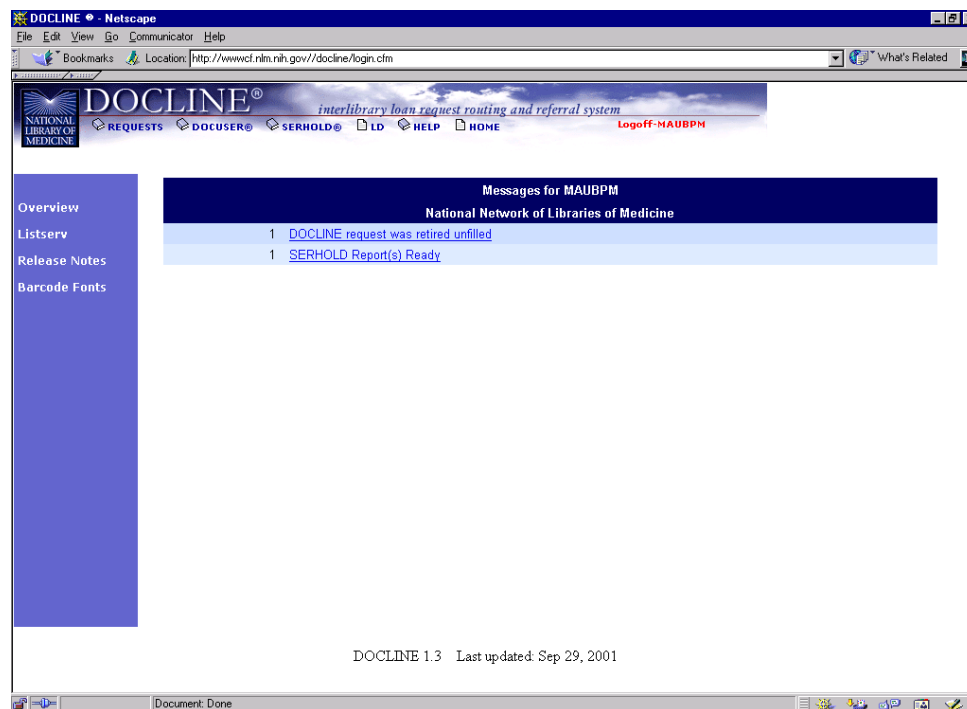
The screenshot shows the DOCLINE web interface after a report has been submitted. The main content area displays a confirmation message:

- Your report has been submitted. It will be available tomorrow at the earliest. If there are a large number of reports in the queue, your report may not be available for several days.
- To review your report status or cancel the report, click [Review/Cancel Submitted Report\(s\)](#).
- To view the reports that have completed running, click [Reports Ready](#).

The sidebar on the left remains the same as in the previous screenshot, providing navigation links for various report functions.

IV. SERHOLD Reports

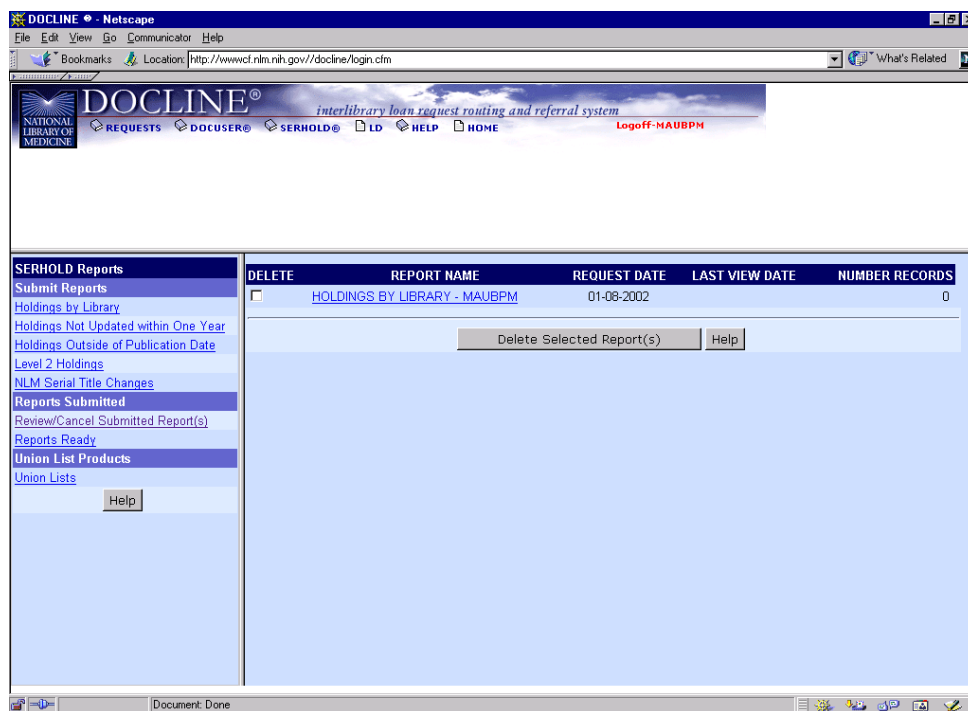
The system confirms that your request has been submitted and provides information about when to expect it and how to view it.



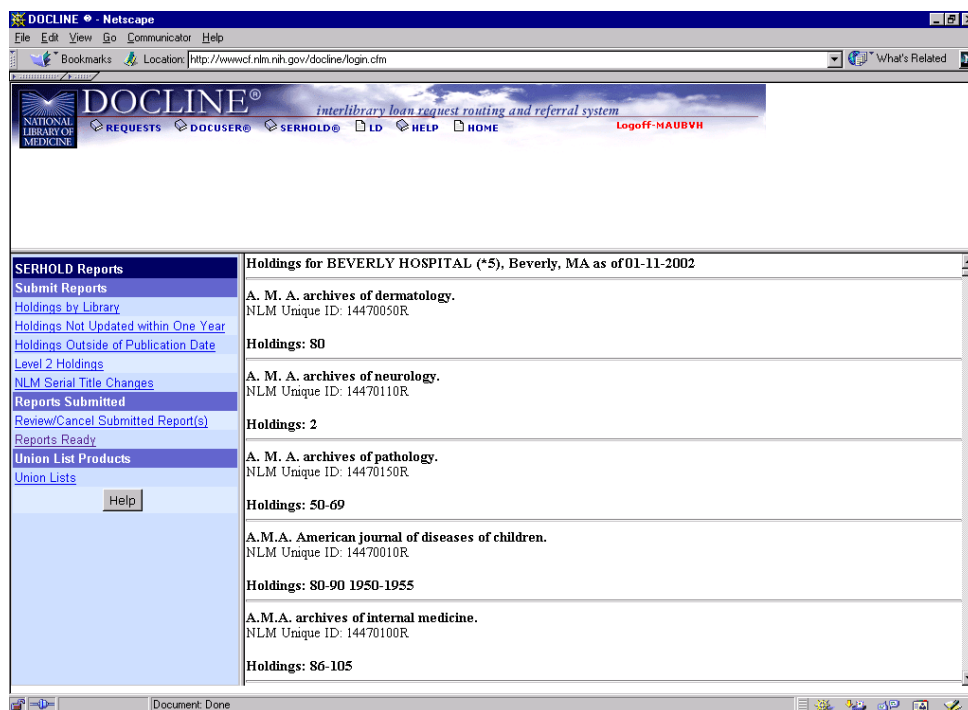
When your report is ready, you will receive a message on your DOCLINE Home screen.

IV. SERHOLD Reports

Click the Report Name link to view the report.

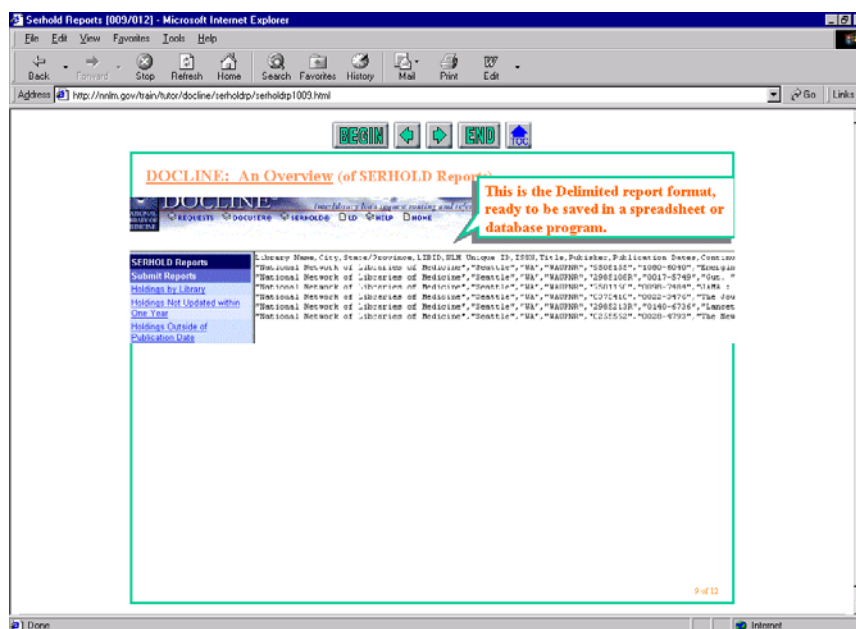


Below is an example of the *Standard Report* format, ready to be printed.



IV. SERHOLD Reports

Below is an example of the *Delimited Report* format, ready to be stored within a spreadsheet or database. Each serial record is on a separate line. Use the scroll bar at the bottom of the screen to view complete records. You can specify whether you want field names to appear in the first row. You can also choose what delimiter is used to separate fields.



You can specify whether you want field names to appear in the first row. You can also choose what delimiter is used to separate fields. Use your browser to save data in a text (.txt) file. In the example above, field delimiters are commas and text qualifiers are within quotation marks.



A CLOSER LOOK

- When conducting a Journal Title/Title search, please keep in mind that titles must be NLM-approved (i.e., you cannot be creative -- journals with subtitles must have complete titles.)
- Please keep in mind when borrow requests are filled according to automatic routing via SERHOLD, the matching request-to-holdings program will match either on Volume or Year, but not both.

IV. Exercises

1. How many "Freeshare" libraries in New England hold JAMA?
2. How much do the larger libraries charge for copies of articles in JAMA?
3. How many BHSL institutions in New England hold The Lancet?
4. Does my library hold European Food Research and Technology [ISSN: 1438-2377]
(a.k.a. Zeitschrift für Lebensmittel-Untersuchung und -Forschung) ?



IV. Answers to Exercises

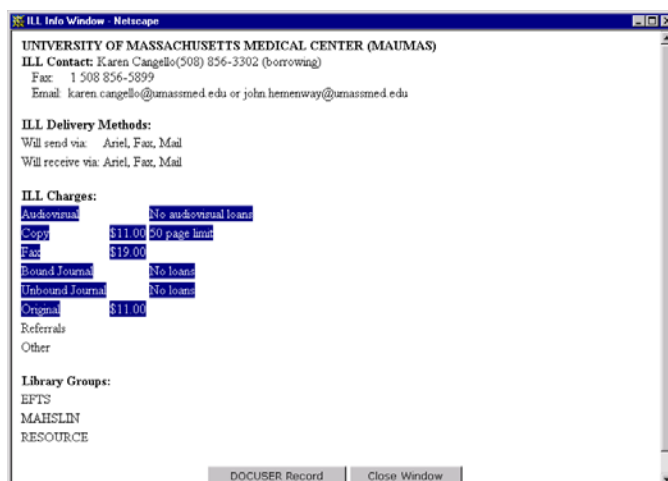
1. How many "Freeshare" libraries in New England hold JAMA? **94**

Search/Checkoff: Region 08 -- New England (NER)

Search/Checkoff: Library Group Freeshare

2. How much do the larger libraries charge for copies of articles in JAMA?

Click on the arrow to the left of the LIBID (MAUMAS):



Copy	\$11.00	50 page limit
Fax	\$19.00	

3. How many BHSL institutions in New England hold The Lancet? **7**

Search/Checkoff: Region 08 -- New England (NER)

Search/Checkoff: Library Group BHSL

4. Does my library hold European Food Research and Technology (ISSN: 1438-2377) (a.k.a. Zeitschrift fuer Lebensmittel-Untersuchung und -Forschung) ?

MODULE V. LD (LOANSOME DOC)

Loansome Doc contains information about your library's Loansome Doc patrons or *registrants*. With the **LD** function, you can:

- (a.) gain access to your LD registrants file that lists all of the people who are registered to receive LD services from your library; and
- (b.) view information about registrants (including their UserID's and passwords), in addition to authorize or *de*-authorize registrants for service from your library.

*[Note: With Release 1.4, the following fields were added to the LD patron display for the
Ordering Library: delivery method; comments; and transfer authorization.]*

To initiate an LD Administration session:

Step 1. Log into DOCLINE (*see Module I for instructions*).

Step 2. Click **LD**.

The screenshot shows a Netscape browser window displaying the DOCLINE website. The page title is "DOCLINE" and the subtitle is "interlibrary loan request routing and referral system". The navigation bar includes links for REQUESTS, DOCUSER, SERHOLD, LD, HELP, and HOME. A "Logoff-HAUBPM" link is also present. The main content area is titled "Loansome Doc Patrons" and contains a search form. The form has two search input fields, both with "Patron UserID" selected in the dropdown menu. The first search field has a "Contains" dropdown menu. Below the search fields are two "Only if:" dropdown menus, both with "search all" selected. The "Display results as:" dropdown menu is set to "Patron list", and the "In order to:" dropdown menu is set to "View or Update records". The "Sort order:" dropdown menu is set to "Last Name", and the "Records per page:" dropdown menu is set to "25". At the bottom of the form are "Search" and "Reset" buttons.

For a list of all your LD patrons (or registrants), simply leave the screen as it is first displayed (*don't set any search limits!*) and click the **Search** button.

MODULE V. LD (LOANSOME DOC)

DOCLINE: An Overview (of LD)

The list includes Last Name, First Name, UserID, and whether the registrant is Affiliated and Authorized.

To view more information about an individual, click on any of the blue lettering (Last Name, First Name, etc.)

interlibrary loan request routing and referral system

Patron list Records 1 to 23 of 23 matching records.
Search Limits: AND Order by Last Name

Last Name	First Name	UserID	Affiliated	Authorized
Anasetti	Anastasia	ANASTASIA	N	No
Anasetti	Anastasia	LLLLL	Y	Y
Barnes	Susan	XYZZ	Y	Y
Barnes	Susan	XRGK	Y	Y
Blake	Maryanne	BLAKEMA	Y	Y
BLAKE	MARYANNE	GCF22	Y	Y
BLAKE	MARYANNE	GCE22	Y	Y
Boer	Michael	06BOERM	Y	Y
Burroughs	Cathy	CBURROUG	Y	Y
Chinn-Sloan	Pat	PCHINN	Y	Y

5 of 16

The list includes Name, User ID and whether the registrant is *Affiliated* and *Authorized*. To view more information about an individual, click any of the fields highlighted in **blue**.

DOCLINE: An Overview (of LD)

The list includes Last Name, First Name, UserID, and whether the registrant is Affiliated and Authorized.

To view more information about an individual, click on any of the blue lettering (Last Name, First Name, etc.)

interlibrary loan request routing and referral system

Patron list Records 1 to 23 of 23 matching records.
Search Limits: AND Order by Last Name

Last Name	First Name	UserID	Affiliated	Authorized
Anasetti	Anastasia	ANASTASIA	N	No
Anasetti	Anastasia	LLLLL	Y	Y
Barnes	Susan	XYZZ	Y	Y
Barnes	Susan	XRGK	Y	Y
Blake	Maryanne	BLAKEMA	Y	Y
BLAKE	MARYANNE	GCF22	Y	Y
BLAKE	MARYANNE	GCE22	Y	Y
Boer	Michael	06BOERM	Y	Y
Burroughs	Cathy	CBURROUG	Y	Y
Chinn-Sloan	Pat	PCHINN	Y	Y

5 of 16

MODULE V. LD (LOANSOME DOC)

The record for that registrant displays.

The screenshot shows a web browser window titled "DOCLINE - Microsoft Internet Explorer". The address bar shows "http://www.nlm.nih.gov/docline/login.cfm". The page header includes the DOCLINE logo and navigation links: REQUESTS, DOCLINE, SERHOLD, LD, HELP, HOME. A "Logout: MARSAS" link is also visible.

The main content area is titled "Update Patron Information" and "Display Only". It displays the following information:

Carol Morello (CJMVMD)
CeramOptec
515 Shaker Road
East Longmeadow MA 01028

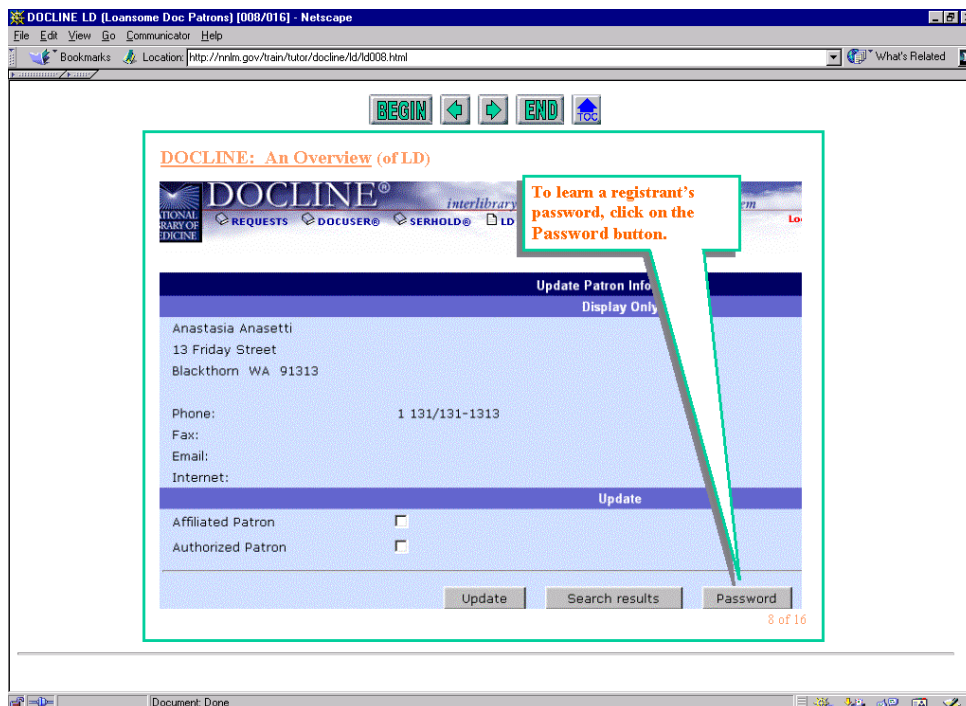
Phone: 1 413 525 0600
Fax: 1 413 525 0611
Email: carol@ceramoptec.com
Delivery Method: Fax
Forwarding: Authorized to obtain articles from other libraries
Comment:

Below the information is an "Update" button. At the bottom of the form, there are two checkboxes: "Affiliated Patron:" and "Authorized Patron:". Both checkboxes are currently unchecked.

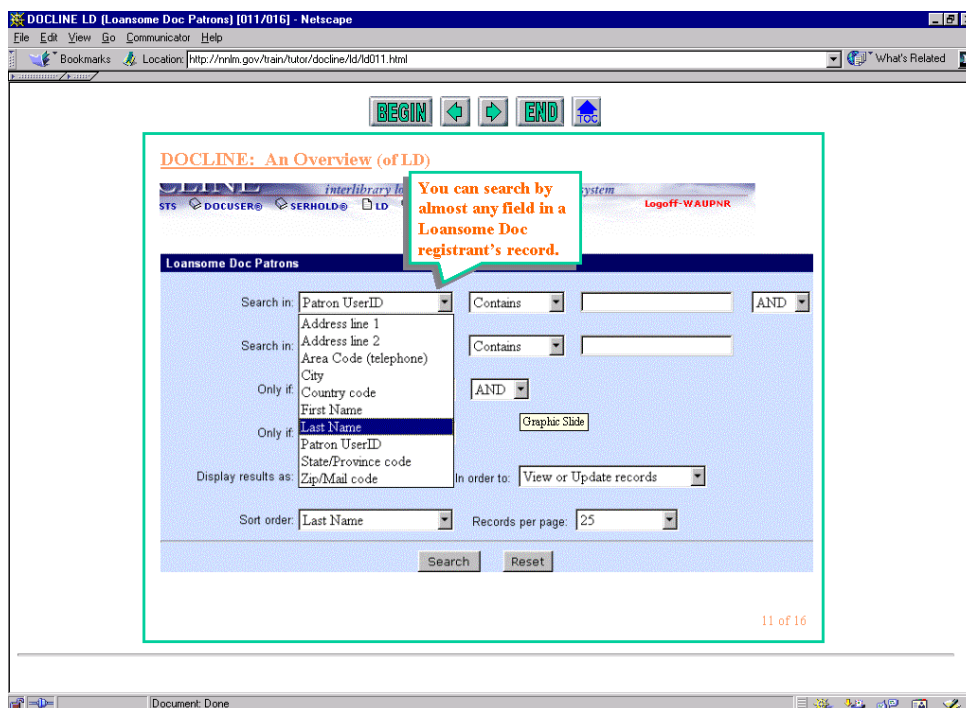
At the bottom of the page, there are three buttons: "Update", "Search results", and "Password". The text "Last updated on: JAN 16, 2001" is displayed at the bottom right.

You control whether a registrant is affiliated or authorized by checking or clearing the *Affiliated Patron* and *Authorized Patron* boxes. A person who is not authorized cannot send LD requests to you.

MODULE V. LD (LOANSOME DOC)



To learn a registrant's password, click the **Password** button. You can search by any field in an LD registrant's record.



MODULE V. LD (LOANSOME DOC)



KEY NOTE

You cannot delete patrons from your LD Patron List; patrons may only be "deactivated" by you.

On a routine basis, NLM will run a program to delete "deactivated patrons from their database. This will happen automatically and requires no intervention by you or by the NER Regional office.



MODULE VI. CONCLUDING NOTES

Contacts

National Network of
Libraries of Medicine (NN/LM)

Network Coordinator, New England Region (NER)
Mark Goldstein
Email: mark.goldstein@umassmed.edu
Phone: 508-856-5964

Electronic Fund Transfer System

University of Connecticut Health Center (EFTS)
Colleen Giblin
<http://nnlmner.uchc.edu/efts/>
Phone: 860-679-4500

Laudable Links

<http://www.nlm.nih.gov/pubs/factsheets/docline.html>

good introductory information

<http://www.nlm.nih.gov/services/faqdocline.html>

*"frequently asked questions"
(scroll to "General" section)*

<http://nnlm.gov/libinfo/docline/>

links from NN/LM (RML) web site

<http://www.nlm.nih.gov/docline/newdocline.html>

links from the NLM web site

<http://nnlm.gov/train/tutor/docline/>

DOCLINE tutorial on the web

Helpful Habits

- Within the DOCLINE system, click the **PREVIOUS** button on the screen instead of relying on your browser's BACK menu option.
- Before starting an online session, reload your screen image by "checking off " the Personal Toolbar from your browser. This will afford you a little more headroom to view the DOCLINE screens. Please keep in mind that you cannot adjust monitor resolution for PubMed screens.
- Exit each screen within the DOCLINE system clicking the **Update/Save** button. You will need to save updates and changes on a "screen-by-screen" basis (i.e., there is no global submit or save function.)
- Regard the HOME function within DOCLINE as your "lifeline" or "escape hatch."

